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The Wine Spectator California Winemen Oral History Series

Zelma R. Long

THE PAST IS THE BEGINNING OF THE FUTURE: SIMI WINERY IN ITS SECOND CENTURY

With an Introduction by
Dr. Ann Noble

Interviews Conducted by
Carole Hicke
in 1991 and 1992

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Since 1954 the Regional Oral History Office has been interviewing leading participants in or well-placed witnesses to major events in the development of Northern California, the West, and the Nation. Oral history is a modern research technique involving an interviewee and an informed interviewer in spontaneous conversation. The taped record is transcribed, lightly edited for continuity and clarity, and reviewed by the interviewee. The resulting manuscript is typed in final form, indexed, bound with photographs and illustrative materials, and placed in The Bancroft Library at the University of California, Berkeley, and other research collections for scholarly use. Because it is primary material, oral history is not intended to present the final, verified, or complete narrative of events. It is a spoken account, offered by the interviewee in response to questioning, and as such it is reflective, partisan, deeply involved, and irreplaceable.

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Zelma Long, 1991.

Photograph by David Buchholz

Cataloging Information

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Introduction by Dr. Ann Noble, Professor, Department of Viticulture and Enology, University of California, Davis.

Interviewed in 1991 and 1992 by Carole Hicke for the Wine Spectator California Winemen Oral History Series, The Regional Oral History Office, The Bancroft Library, University of California, Berkeley.

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PREFACE

The California wine industry oral history series, a project of the Regional Oral History Office, was initiated in 1969 through the action and with the financing of the Wine Advisory Board, a state marketing order organization which ceased operation in 1975. In 1983 it was reinstituted as The Wine Spectator California Winemen Oral History Series with donations from The Wine Spectator Scholarship Foundation. The selection of those to be interviewed is made by a committee consisting of the director of The Bancroft Library, University of California, Berkeley; John A. De Luca, president of the Wine Institute, the statewide winery organization; Maynard A. Amerine, Emeritus Professor of Viticulture and Enology, University of California, Davis; the current chairman of the board of directors of the Wine Institute; Ruth Teiser, series project director; and Marvin R. Shanken, trustee of The Wine Spectator Scholarship Foundation.

The purpose of the series is to record and preserve information on California grape growing and winemaking that has existed only in the memories of wine men. In some cases their recollections go back to the early years of this century, before Prohibition. These recollections are of particular value because the Prohibition period saw the disruption of not only the industry itself but also the orderly recording and preservation of records of its activities. Little has been written about the industry from late in the last century until Repeal. There is a real paucity of information on the Prohibition years (1920-1933), although some commercial winemaking did continue under supervision of the Prohibition Department. The material in this series on that period, as well as the discussion of the remarkable development of the wine industry in subsequent years (as yet treated analytically in few writings) will be of aid to historians. Of particular value is the fact that frequently several individuals have discussed the same subjects and events or expressed opinions on the same ideas, each from his own point of view.

Research underlying the interviews has been conducted principally in the University libraries at Berkeley and Davis, the California State Library, and in the library of the Wine Institute, which has made its collection of in many cases unique materials readily available for the purpose.

The Regional Oral History Office was established to tape record autobiographical interviews with persons who have contributed significantly to recent California history. The office is headed by Willa K. Baum and is under the administrative supervision of The Bancroft Library.

Ruth Teiser
Project Director
The Wine Spectator California Winemen
Oral History Series

July 1992
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University of California, Berkeley

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Interviews Completed July 1992

Leon D. Adams, Revitalizing the California Wine Industry, 1974

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Philo Biane, Wine Making in Southern California and Recollections of Fruit Industries, Inc., 1972

John B. Cella, The Cella Family in the California Wine Industry, 1986

Charles Crawford, Recollections of a Career with the Gallo Winery and the Development of the California Wine Industry, 1942-1989, 1990

Burke H. Critchfield, Carl F. Wente, and Andrew G. Frericks, The California Wine Industry During the Depression, 1972

William V. Cruess, A Half Century of Food and Wine Technology, 1967

Jack and Jamie Peterman Davies, Rebuilding Schramsberg: The Creation of a California Champagne House, 1990

William A. Dieppe, Almaden is My Life, 1985

Making California Port Wine: Ficklin Vineyards from 1948 to 1992, interviews with David, Jean, Peter, and Steven Ficklin, 1992

Alfred Fromm, Marketing California Wine and Brandy, 1984

Louis Gomberg, Analytical Perspectives on the California Wine Industry, 1935-1990, 1990

Miljenko Grgich, A Croatian-American Winemaker in the Napa Valley, 1992

Joseph E. Heitz, Creating a Winery in the Napa Valley, 1986

Maynard A. Joslyn, A Technologist Views the California Wine Industry, 1974

Amandus N. Kasimatis, A Career in California Viticulture, 1988

Morris Katz, Paul Masson Winery Operations and Management, 1944-1988, 1990

Legh F. Knowles, Jr., Beaulieu Vineyards from Family to Corporate Ownership, 1990

Horace O. Lanza and Harry Baccigaluppi, California Grape Products and Other Wine Enterprises, 1971

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Norbert C. Mirassou and Edmund A. Mirassou, The Evolution of a Santa Clara Valley Winery, 1986

Peter Mondavi, Advances in Technology and Production at Charles Krug Winery, 1946-1988, 1990

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Michael Moone, Management and Marketing at Beringer Vineyards and Wine World, Inc., 1990

Myron S. Nightingale, Making Wine in California, 1944-1987, 1988

Harold P. Olmo, Plant Genetics and New Grape Varieties, 1976

Cornelius Ough, Researches of an Enologist, University of California, Davis, 1950-1990, 1990

John A. Parducci, Six Decades of Making Wine in Mendocino County, California, 1992

Antonio Perelli-Minetti, A Life in Wine Making, 1975

Louis A. Petri, The Petri Family in the Wine Industry, 1971

Jefferson E. Peyser, The Law and the California Wine Industry, 1974

Lucius Powers, The Fresno Area and the California Wine Industry, 1974

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Arpaxat Setrakian, A. Setrakian, a Leader of the San Joaquin Valley Grape Industry, 1977

Elie Skofis, California Wine and Brandy Maker, 1988

Andre Tchelistcheff, Grapes, Wine, and Ecology, 1983

Brother Timothy, The Christian Brothers as Wine Makers, 1974

Louis (Bob) Trinchero, California Zinfandels, a Success Story, 1992

The Wente Family and the California Wine Industry, interviews with Jean, Carolyn, Philip, and Eric Wente, 1992.

Ernest A. Wente, Wine Making in the Livermore Valley, 1971

Albert J. Winkler, Viticultural Research at UC Davis (1921-1971), 1973

John H. Wright, Domaine Chandon: The First French-owned California Sparkling Wine Cellar, includes an interview with Edmond Maudière, 1992

INTRODUCTION--by Ann C. Noble

Zelma Long is a tall, slender, and elegant individual with a shock of blond hair. Long before the casual look was approved as a career woman's style of dress, Zelma patented it. Beyond this superficial description of her appearance, on talking to her, one immediately realizes that she is a very poised, articulate, and strong person, who can be very intensely focused or can switch gears and be ready to laugh and enjoy life equally intensely.

I first met Zelma in the mid-'70s through University functions, such as short courses. Over the years, I have increasingly had opportunities to interact with her on both a professional and personal basis. As she first emerged in the mid-'70s as a recognized enologist, the press was eagerly reporting on her and the few other women in the wine industry, perhaps incorrectly giving the impression that they were token women. Zelma Long and Mary Ann Graf with a few others did serve as pioneer women winemakers in an industry previously dominated by males. However, within the industry, from the start Zelma and Mary Ann were recognized for their skills, not for being female winemakers. In addition to her activities described in this text, Zelma was the informal founder of the Goddesses, a group of women in the wine industry and related fields, who meet to celebrate life and their achievements. Through these rafting, hiking, horseback riding, and camping outings I have gotten to know Zelma and truly appreciate the intensity of her approach to her work and to life.

This oral history chronicles very well the development of Zelma's winemaking career, which parallels the explosive growth of the California wine industry in numbers of wineries, personnel, capital invested, and level of experience. It also documents her personal growth, from her apprenticeship under Mike Grgich where she learned details of winemaking, through the development of her own winemaking style as she integrated what she had learned. From this synthesis of her experience, she has structured her own winemaking philosophy and direction. For several years, Zelma has given the last lecture in my Sensory evaluation of wine course. Although she excites the students each year with her presentation, her approach has changed reflecting her recent development as a leader in the wine industry. She has shifted her emphasis from reviewing details of winemaking, which of course is valuable information for the students, to focusing on the importance of establishing one's winemaking goals. This change in orientation is a valuable and exciting one; at the University we can give students a scientific background, through internships they can learn practical details of winery operations, but only by seasoned thinking winemakers can they be challenged to set their focus on a goal rather than on the details.

Zelma and others in the wine industry have played a leading role in supporting research. Without the far-sighted outlook of such individuals and their keen interest in continually improving wine quality, the initial dramatic contributions which the University made to improve the quality of California wines would not be continuing today.

Ann C. Noble
Department of Viticulture and
Enology

May 1992
University of California, Davis

INTERVIEW HISTORY--Zelma R. Long

Zelma R. Long, President and Chief Executive Officer of Simi Winery, was interviewed as part of the Wine Spectator California Winemen Oral History Series to document the history and evolution of Simi through the 1970s and 1980s. The Simi winery, the first to be built in Healdsburg, dates from 1890. The business was established in the 1870s, then purchased in 1881 by the Simi brothers, Giuseppe and Pietro, who operated it for many years. The winery survived Prohibition and continued as a family operation until purchased in 1970 by Russell Green. By 1974 it was owned by Scottish Newcastle, and Michael Dixon was president. Dixon stayed on when the winery was sold to Schlieffelin & Co, which became the property of the French Champagne company, Moët-Hennessey, in 1981. (Moët-Hennessey now belongs to parent company LVMH Moët-Hennessey Louis Vuitton.) In 1979 then President Dixon hired Zelma Long as winemaker and empowered her to manage a new direction for the winery to be fueled by a $5.5 million capital investment.

Creative, innovative, and research-oriented, Long had been head enologist at the Robert Mondavi winery, where she participated in the whirlwind growth that took place in the 1970s of the winery, the wine industry in general, and knowledge of winegrowing. In her oral history, Long emphasizes the "winegrowing" aspects--the integration of viticulture and enology to produce the end product, wine. At Simi she brought to bear her skills and philosophy, concentrating on aiming for the highest quality wines, particularly Chardonnay, Cabernet Sauvignon, and Sauvignon Blanc. She has written and spoken extensively about wine, and has come to play a leadership role in the industry internationally. She has received several awards for her accomplishments in the field.

Long was interviewed at Simi on September 22 and 23, 1991, and on January 21, 1992. She reviewed and promptly returned the transcript, making a few slight changes. Her assistant, Gayle Curtiss, was most helpful in arranging appointments and furnishing photographs and other materials. Dr. Ann Noble of the University of California at Davis, who has worked with Long at Simi in conducting experimental research, kindly agreed to write the introduction.

This series is part of the ongoing documenting of California history by the Regional Oral History Office, which is under the direction of Willa Baum, Division Head, and under the administrative direction of The Bancroft Library, University of California, Berkeley.

Carole Hicke
Interviewer-Editor

May 1992
Regional Oral History Office
Berkeley, California

BIOGRAPHICAL INFORMATION

Your full name Zelma Jean Reed Long

Date of birth 12-1-43 Birthplace The Dalles, Oregon

Father's full name Lee Caspar Reed Birthplace Dayton, Washington

Occupation teacher, salesman

Mother's full name Jean Lovell Reed Birthplace Ritzville, Washington

Occupation housewife; adoption worker

Family

Spouse Phillip Freese

Children none

Where did you grow up? The Dalles, Oregon

Education BS - Oregon State University
Worked on MS - UC Davis, but did not complete

Areas of expertise enology and viticulture
synthesis
technical communication

Special interests or activities

various outdoor activities - hiking, riding, skiing etc
reading

I BACKGROUND AND EARLY YEARS

[Interview 1: September 23, 1991]##[1]

Family and Childhood

Hicke: I'd like to start at the beginning by asking when and where you were born.

Long: I was born in 1943 in The Dalles, Oregon. I lived in that town through my high school graduation. I completed college in Oregon and then moved to California.

Hicke: Was there any member of your family who had a lot of influence on you?

Long: With regards to wine?

Hicke: With that, but also in your general life and ways of doing things.

Long: You know, I can't say there's a stand-out person. Of course, your parents are always your main influence. Certainly there were no influences relative to wine, because no one that I knew grew grapes, drank wine, or talked or thought about wine.

Hicke: Where do your parents come from?

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[1]This symbol (##) indicates that a tape or a segment of a tape has begun or ended. A guide to the tapes follows the text.

Long: My parents both grew up in eastern Washington.

General Education

Hicke: You went to school in Oregon until you came to California?

Long: I went on to Oregon State University. I started studying home economics with an intent to become a dietitian, so I was majoring in home economics and minoring in dietetics--in nutrition, actually. I really disliked home economics, so after the first year I went to an advisor and asked what I could major in that would allow me to continue my nutrition--developing my nutrition background in courses. The advisor steered me into a general science major, which was a wonderful major because it allowed me to study a wide range of science--chemistry, biochemistry, microbiology--but it wasn't so confining or constraining that I wasn't able to study a wide range of liberal arts courses, too.

So I majored in science and minored in nutrition. In fact, in the long run that turned out to be a very good background, because it was that science background that later was going to enable me to go into the master's program at UC [University of California] Davis without backtracking.

Hicke: Then you started an MBA [Master of Business Administration] program, is that right?

Long: No, my education followed the path of college education, dietetic internship for a year at UC Medical Center in San Francisco, then a few years later returning into the master's program in enology and viticulture at UC Davis in 1968 and continuing in that program on a part-time basis through 1970. The MBA work I did when I first came to Simi in the early eighties, again on a part-time basis. Then in 1988 I went to Stanford for two months for a program called the Stanford Executive Program.[2] I got a broad-spectrum education, which is what I've appreciated.

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[2]The MBA was not completed. The Stanford Executive program was.

ZL

Winemaking Studies

Hicke: You went to UC Davis, and I'd like to hear about your studies there.

Long: I moved to the Napa Valley in 1968. At the time I moved there I had completed my dietetic internship, I'd been working as a dietitian, and I decided that I didn't want to pursue that career. Even in 1968 in the Napa Valley you had a sense that it was an area that was all about grapes and grape growing and agriculture and winemaking, so I thought it might be fun to go back to UC Davis. In addition, my husband's parents had purchased some property in 1966 in the eastern hills of the Napa Valley, and they had started to develop a vineyard. So from '66 to '70 they were slowly planting a small parcel of vineyard, and they were talking about wines and someday having a winery. We actually made a little bit of wine in 1969, just home winemaking.

Partly living in the Napa Valley and partly having this family interest developing in vineyards and wines triggered my interest in going back to school in winemaking. I was thinking, "Well, if they're going to have a winery someday, maybe I can learn how to make wine and contribute." So I went to Davis in '68 and applied for admission into their master's program. Again, because of my science background I was qualified to go into the program. I started to take classes, and I was living in Napa Valley and commuting over there, taking classes three days a week. That continued in '68, '69, and '70.

Hicke: Didn't you study with Dr. [Maynard A.] Amerine?

Long: Dr. Jim [James A.] Cook was teaching viticulture, as was [Dr.] Lloyd [A.] Lider. Amerine was teaching sensory evaluation; Harold Berg--Hod Berg--was teaching wine stability; [Dr.] Ralph [E.] Kunkee was teaching wine microbiology, and [Dr.] Vern [Vernon L.] Singleton was teaching phenolics.

Hicke: You had some of the masters.

Long: Yes, but I didn't take all those courses; I didn't have Vern's phenolics course. Our classes were very small, and it was very easy to know those professors personally. They were

wonderful people, really supportive, so it was a tremendously rich educational environment.

George [M.] Cooke was the extension enologist, and he would come over and look at the vineyards with Bob Long's parents, Bob, and myself. He worked with us when we were doing our first fermentation. We felt integrated into that department and the people there. Those were some lifelong friendships that we established. Jim Lider, Lloyd Lider's brother, was the Napa County extension agent at the time, and he was the one who had made the original recommendations for the grapes to plant at Long Vineyards. So we really knew him before we knew his brother, who was a professor at UC Davis.

Hicke: What did you plant?

Long: It's interesting to look back. We planted a lot of Johannisberg Riesling on Jim's recommendation. We planted a very small amount of Chardonnay, and he really didn't encourage us to plant more, because he felt that Chardonnay had been very unsuccessful. [laughter] You know, it's funny to look back. Also, in those first few years my parents-in-law had a home in Angwin, and my husband and I bought a house in Angwin. We traveled up and down the hill from St. Helena to Angwin, and one of the wineries along the road was Souverain [Cellars]. Souverain and Stony Hill, when I came to the Napa Valley in the sixties, were two of the wineries that were the avant garde, making new wines and fine wines.

I got to know Lee Stewart, the owner of Souverain . In fact, his wine was the first California wine I ever tasted. I remember Lee Stewart saying, "Chardonnay will never make a great wine in California. It's just not that good a variety." [laughter]

So we planted a lot of Riesling and a little Chardonnay, and we grew those varieties for about ten years. Then, from 1979 or '80 through 1987, we proceeded to either T-bud or replant almost all the Riesling to Chardonnay [laughs], because Chardonnay in fact was extraordinarily successful in that site. We've made some great Rieslings, but Chardonnay was more of a commercial success. That pretty much mirrored the whole pattern, and there were very good reasons for it. In those days the Chardonnay clones that were planted in the valley that were "unsuccessful" were unproductive, susceptible to disease. From a farming point of view they were very undependable and unsatisfactory. It wasn't until the more

productive clones of Chardonnay that [Dr.] Harold [Paul] Olmo developed at Davis came into commercial use, which was pretty much in the seventies, that Chardonnay became of more commercial interest for a grape grower. That coincided with more public interest and more success, and it just rolled out from that.

Hicke: He probably had part of that right, if that clone development hadn't taken place. Or had it already taken place by then?

Long: It's hard to know. I would say that certainly the planting decisions of the time were made with the best information at the time, but in fact it turned out to be just the opposite of what worked really well.

Hicke: Why is Chardonnay so much more popular than Riesling?

Long: That's a good question. I think in a general way that it's the flavor quality of Chardonnay that makes it unique. It has a rich texture and flavor. As you drink good Chardonnay, it always has the sensation of richness and silkiness, and it has a particular personality or group of flavor components--the butter, honey, vanilla, coffee characteristics--that I think are flavors that the American public really likes; these are all flavors that Americans like intrinsically. So the texture, the body, and the flavor personality of Chardonnay honed into a spectrum of tastes and sensations that just had a broad general appeal.

II WINEMAKING AT ROBERT MONDAVI WINERY: 1970-1979

Joining the Winery

Hicke: How did you actually get into winemaking?

Long: By 1970 I had spent about two years at Davis, and I was in the process in August of 1970 of getting ready to go back to school to complete my master's course, with really little thought of doing anything but that. But Mike [Miljenko] Grgich, who was the enologist in charge of the winemaking at Robert Mondavi, called me--I didn't know who he was--and left a message that he would be interested in having me come to work for the harvest. I called him back, and we chatted. It turned out that Robert Mondavi was just starting the harvest, and Mike desperately needed someone to work with him, just for the harvest period, to do pretty basic work--keeping some of the winemaking records and doing the rather simple analysis that's done around harvest. Someone at the University had given him my name.

Hicke: I was wondering how he found it.

Long: Really, to this day I don't know who that was. I started out by declining his offer, because my mind was on returning to school. He called me back, and he said, "You know, this is a really good opportunity; it's a good learning opportunity, and you should seriously consider it." So I thought, "Well, maybe I should give it a try." I went down and talked to him, and I started soon after that. They had already started to harvest, and Robert Mondavi that year, 1970, as I recall, crushed about 1,700 tons of grapes, which would be about a

hundred thousand cases, not necessarily a small amount for the time--a fairly large amount--but certainly small compared to what they ultimately developed.

I was immediately fascinated. I was hooked.

Early Responsibilities

Hicke: So for that first crush you were keeping records?

Long: I was keeping production records and doing analysis. I would go around with Mike every day and check each fermenter and record the Brix and the temperature and taste it. It was a wonderful time, because Mike was a winemaker with both the European traditional roots of winemaking--his family made wine when he grew up--and what was for that time some very sophisticated experience that he'd had at Beaulieu [Vineyard] for ten years working with André Tchelistcheff. He also worked with Lee Stewart, so he'd been working with some very high-quality grapes and some of the top people in the valley.

As we would go around from tank to tank recording the information, he would talk about the wine and how it was being made and the personality in a mixture of the technical information and the European, rather romantic way of talking about wine--which you've experienced, for example, if you've ever talked to André Tchelistcheff; the Europeans take a very different way of thinking and talking about wine.

Hicke: It has a little bit to do with that mystifying and demystifying aspect.

Long: Exactly right. They haven't lost the sense of romance and beauty and humanity and spirituality. I think they haven't lost it, and we--you know, it's there for us. Intrinsically that's what provides the attraction for the industry, but it's not something that we talk about as easily as the Europeans do.

Hicke: Where did Mike get that?

Long: He was Yugoslavian, and that was part of his background and heritage.

Hicke: Did you stay on with them for the rest of the year?

Long: After harvest Mike asked me if I would consider continuing to work part time, and I decided I would do that, because in fact I found the winery work was completely fascinating. It was so interesting and so different from anything I had ever done. There were so many variables. It was very complex and therefore intriguing and intellectually challenging.

So I continued to work part time there that first year. Then the second harvest rolled around, and as I recall we doubled our production from the first to the second year, so that was a significant amount of work; that was the '71 harvest. I started to work full time, and I'm still a little hazy about exactly when that started, but I was obviously working full time at harvest, and after the harvest of '71 I continued to work full time.

Change and Innovation

Long: There was a lot of physical change at Mondavi's in that time period. When they started, the laboratory was up in the tower, what are offices now was their barrel room, and they had just completed what is now the main part of the winery. So in that first year that I worked we moved into a brand-new laboratory, and the winery continued to grow. At the same time, the Mondavis clear through the seventies had a tendency to try everything new that they came across. It seemed like every year we had a new press, a new centrifuge, some new piece of equipment. There was growth in the amount of wine that was being produced, and there was also a lot of change, both in the physical circumstances at the winery and in the kinds of equipment and techniques that we were using. That was just the start, but it was a continuing period of tremendous change from year to year.

Hicke: All that change was basically Robert Mondavi's thrust, or was Mike in on that, too?

Long: If I remember correctly, Mike [Michael] Mondavi worked with Robert from the beginning in 1966, so he was really in charge of the winemaking in a very general sense at that time, but Mike Grgich was the person who was making all the day-to-day decisions with the interaction of Robert Mondavi. Bob

Mondavi would come around--I was describing this daily morning tasting of all the fermenters--and join us on those tastings from time to time and give his input. When we were doing winemaking tasting decisions, he would join us with some regularity.

Certainly through most of my tenure at Mondavi, Robert Mondavi, particularly in the first six years, was the person whom I thought of as giving the basic, general imprint to the wine. Then in the years that Mike Grgich was there, he was the person who would take the general direction and turn it into action and interpret it into daily decisions. When Mike left, it became my responsibility to take this general direction and turn it into specific action on a daily basis.

Hicke: I'm particularly interested in this foment of change, because I see that in Simi since you came here. It's clearly going on today. Did you pick that up there, or was that Robert Mondavi's style?

Long: It was his style. Our industry really has been a fantastic opportunity. With his style, he had a tremendous energy and a tremendous curiosity, so it's almost for me as if I never knew another way. I do have this sense that the wine industry tends to attract people either from an intellectual or a sensual, sensory basis; it gets people either in one place or another or both. From my perspective, the core of what was happening there was seeking to continue to evolve quality and style and looking at all kinds of tools to do that. In that decade there were more winery tools--barrels, presses, fermenters, centrifuges--that were used to control, modify, manage, and enhance the winemaking process.

When I came to Simi, I saw the tools as the vineyard, and I still do. I think the general vision that Robert Mondavi gave the industry in that time period relative to winemaking was the sense of, "Let's ask a lot of questions about the process, and let's try a lot of things." In doing that, we were able to refine our winemaking, and it was all in the milieu of this enormous growth. In four years we went from 1,700 to about 7,500 tons of grapes crushed, and believe me, that is a considerable expansion. So it was a crazy, exciting environment to work in--both crazy and exciting.

Hicke: If there is any one way you could describe it, can you encapsulate the reasons for his success?

Long: I think Mondavi's success is relevant to his vision. He could see something and had clarity of that vision, the intensity of belief and his confidence in that vision--the vision was the quality and the place of California wines in the world. He had this vision and a great deal of confidence to support that vision, and a tremendous amount of physical energy to apply toward it. The physical energy wasn't just in terms of how many hours a day you could work. It's this positive force that motivates people to see things the way you see them and want to achieve what you want to achieve. It is physical energy carried to a charisma that is a tremendously motivating force on people.

Hicke: So he was really an inspiration?

Long: For me, working at Robert Mondavi for those ten years was a tremendous opportunity. I had an opportunity to probably try and experience and experiment with every different kind of grape, source of grape, every piece of winemaking equipment. Then I also directed a research program, so we were able to raise and answer many, many questions in winemaking. I was able to see the result of many more techniques than we actually used on a daily basis, so it was just an incredible opportunity.

It was really a wonderful opportunity to work with Robert Mondavi. I have enormous respect for him. I was recently at the winery's twenty-fifth anniversary, and as you listened to the past employees talk about Robert Mondavi, they all have stories to tell. Many of them are very funny, but they're all told with this underlying affection. I think Mr. Mondavi often could ask for things that were impossible to do. We used to tease him and say, "Look, we can do anything, but we can't do everything all at once." There was always this underlying positive expectation that each person was really contributing and an expectation of a positive outcome of events--and good will, just a tremendous amount of good will.

Hicke: He has outstanding "people" skills, obviously.

Long: Yes, he does, and he certainly had outstanding people.

Hicke: What was the research program you conducted there?

Long: When I first started there and was really an apprentice, for every question we answered, we probably raised three questions--and we still do. For example, if you're making Cabernet, what's the desirable length of fermentation? How often should it be mixed or pumped over? How often, how long? What would the highest fermentation temperature be? How long should it sit on the skins before pressing? Should we separate the press wine? With every wine, as we talked about the whole game plan for making that wine, we would have a hundred alternatives.

You know, in those days there was very little experience in the industry; there wasn't the body of knowledge that was passed down from generation to generation. All of the people making wine in the seventies were really young winemakers looking to get as much information as they could through their own experience. The experiments would, say, designate ten barrels of Chardonnay and use a different yeast with each barrel. Or we would do small-lot winemaking and make some variations in how we made a particular lot of wine. They were a way for us to learn ourselves about how the variables in winemaking affect the wine itself. They enabled us to fine tune the winemaking process, and they taught us about the winemaking, in that we could take information and use it to transcend a particular situation and allow us to make better decisions in other situations.

That research program in the first few years was casual. Then later, by the mid-seventies, there was a research enologist hired, and during harvest we had a small-lots winemaker who spent time making five-, ten-, and fifteen-gallon lots of wines with different variations. A whole research branch of the winery developed.

How Winemaking Evolved In the 1970s, 1980s, and 1990s##

Long: In general, I see three differences in the three decades of winemaking. In the seventies I see this seeking to understand the winemaking process in the winery. You're dealing with a very young group of winemakers: how do we really make wine, how do we learn how to make the decisions in the winery, what's the proper kind of barrels and equipment? We were exploring fermentation strategies, barrel aging strategies, and many different things. In the eighties

the question became: what is it in the vineyard that we can learn about and use that's going to impact positively the style and quality of the wines? In the eighties there has been a tremendous burst of experimental work in the vineyards. In the nineties, the questions are: what are the characteristics of each specific site, and how, in any given vintage, can I modify my winemaking to best suit the grapes from a particular site?

To take one variety as an example, in the 1970s we would have been saying, "What's the best fermentation temperature for Chardonnay? Should it be barrel-fermented or not? What kind of barrels should it be aged in? Should it have skin contact? How much skin contact?" In the eighties, the questions would have evolved into, "What's the right harvest timing for Chardonnay? What are the right sources of Chardonnay? Are clones important? What about proper crop load?" And then refinement of winery technique. By the eighties, barrel fermentation and malolactic fermentation were accepted, and we looked at nuance of skin contact, direct to press, press separation, lees contact, lees stirring, and really looked at the nuances in the use of barrels. But at the same time we were raising all these questions about the vineyard. We had refinement of winemaking technique, and now came the basic questions of the vineyard.

In the nineties I think we will see refinement of viticultural technique applied to winemaking, and then we're going to see these questions about, "Well, we're not really talking 'Chardonnay' when we make Chardonnay; we're talking about 'Chardonnay in 1991 from this four-acre plot of land in northwestern Alexander Valley on rocky loam soil that's a seven-year-old planting.' How do we fine-tune our winemaking to that Chardonnay?" Winemaking questions about Chardonnay as a varietal will evolve to questions addressed to Chardonnay in a specific site in a specific vintage. It is called site specific winemaking. That's going to be what happens in the next ten years. At the end of the nineties the people who can most successfully answer that question and practice site specific winemaking will be the best winemakers; they'll be producing the best wines.

That's integration of winegrowing and winemaking--integration of the vineyard, the viticulture, the vintage, and the winemaking process.

Hicke: The kit of maps with the different kinds of soil and different clones and varieties was fascinating. I see where that's going, but I don't know how you can keep track of all that. [See maps following page 59]

Long: It's like anything else; you do little generalizations. You don't maybe know the details of every single soil that you're working with, but you begin to group them into certain types and behavior patterns and so forth.

Hicke: We leaped ahead here, but that's a nice overview of how things have gone.

Experimentation in the 1970s

Long: You were asking about the experiments and what they mean to winemaking today. In many ways they're not directly relevant to winemaking today. They were relevant to the time. Still and all, they established a base of information that we almost know instinctively now and take for granted. The things that we do now routinely, for example with Chardonnay--malolactic fermentation, barrel fermentation--it wasn't until the end of the seventies that people were more or less using those techniques. So what we don't even think about much now was still being developed and explored in that time.

Hicke: It's an amazing amount of change, isn't it?

Long: It is, and what's true about that change is that you have to come back and ask the same questions over again. For example, the issue of skin contact--in the seventies it was discussed, and there was a certain general direction taken for use of skin contact for Chardonnay because people had a certain expectation of what Chardonnay should be like: big and rich. The general use of new barrels in the seventies was "the more the better," and that was all in the context of thinking that the best Chardonnays were those big, oaky, fat, buttery ones. In the eighties that changed. The perception of what a good Chardonnay was changed; it evolved. So all of the time that the winemaking was evolving, so was the palate of the winemakers, the palate of the public, and the understanding of what a great wine really was. What was an appropriate technique within the style and quality goals of

the seventies was not necessarily appropriate in the eighties and will not necessarily be appropriate in the nineties. The standards change.

The change of our standards for a fine wine is not talked about very much and is probably the most important change. I believe that the approach should be the opposite from the way most people talk. Most people start with the process and end up with a product; but with wine, most important is to start with what you want to make: what is in your head? What's a great Cabernet, Chardonnay, Zinfandel, whatever it is you want to make? What does it taste like, what does it smell like, what does it feel like in your mouth? And then you work backwards to the process, how you can achieve your ideal.

That vision of the wine really changed in each decade, so that as I look back on the wines of the seventies now, I think they were very rustic wines. I mean, they were woody Chardonnays, herbaceous Sauvignon Blancs, and astringent Cabernets. [laughter] The decisions that were taken to make those wines are obviously not going to be the decisions that we would make now, so the questions have to be reexamined in the light of new standards. I've been lucky to have been here for a while; I can see us coming around and asking the same questions again. But it's often the same questions set against different standards, different expectations, different grape material, different style goals.

Hicke: How do the goals and standards change?

Long: In the early seventies you had an inexperienced group of winemakers and an inexperienced group of wine drinkers. As time went one, the palate of both the consumer and the producer have developed. We spent a lot of time in the seventies and eighties--myself personally and we as an industry--traveling around the world and bringing people in from other parts of the world, tasting wines and developing our taste. It would be similar to someone who has never heard music, hears music for the first time, and then listens to music and considers the composition and the way music is produced--how they would evolve over a twenty-year period. They would be much more sensitive to the nuance and to the harmony, the balance, the style, and the personality. Well, the same thing happened with wine. I think the tastes of both consumers and the winemakers became, over time, with

this attention to the wine on a world stage, much more sophisticated.

And that's still happening. I interviewed for an assistant winemaker position this year, and one of the things we asked candidates to do was to bring us wines that they considered to be great wines in world terms and to pour them and talk about why they felt they were great in world terms. Certainly in my experience and opinion, some of those people were very on-target, and some were way off target. That was very important to me, because that goes back to where a person's head is; what are they thinking? The biggest inhibitor to achievement is your mind, or the biggest enabler. People can only do what they can see. You were asking why Robert Mondavi could do all these things. Well, he could see them, and some people just don't see.

In a very general way, the vision of California winemaking has evolved and expanded and become refined over the last twenty years.

Hicke: It is artistry in a sense, and also it's so true of an artist--that an artist can usually see much more than somebody who is not an artist. But I'm still a little vague on--for instance, the taste of somebody learning about music might approach that of Beethoven. In winemaking, do you get closer and closer to Bordeaux style, or is there something out there that you are heading for?

Long: I think that in any art or craft form there are elements of balance and harmony. In wines, quality in my opinion is concerned with issues of complexity, flavor concentration and length, balance, harmony--that is, the whole internal harmony of the wine, how the smell of the wine relates to the taste of the wine, the internal components of taste, the acidity, the flavor concentration, and the tannin structure. So balance and harmony, length, complexity, structure, ability to age and develop--and these characteristics can be applied to any wine in any country of any variety. The particular personality that the grape gives is a flavor profile that's different with Riesling, Chardonnay, and Cabernet, and it's different with Cabernet in Bordeaux and Cabernet in California. But those flavor profiles can still be expressed with complexity, balance, and harmony.

Hicke: So they're objective standards, not just subjective?

Long: Well, they're subjectively objective. We talk about that in terms of difference of style and quality. There are certain issues of quality that we think are transcendent, and you can have differing styles and differing personalities and still maintain those quality levels.

Hicke: That enables you to work with different varieties of grapes and different years.

Long: And different places. When we taste here at Simi, we're always seeking wines that we think are great wines, wines that exhibit at a particular time those characteristics. There are vineyards in the world that are known to do a better job of consistently expressing a very high level of these transcendent quality values.

It's different from trying to make one wine like another one. Even in people--you could see someone who you think was educated and sensitive and worked well with people, and you could say, "I'd like to have those characteristics." You could think about achieving some of them and still being yourself. You can pretty easily conceptually separate the sense of personality and quality in wine.

Hicke: That's a good explanation.

Becoming Head Enologist: 1972

Hicke: Getting back to the seventies, in '72 you became head enologist.

Long: Yes, Mike Grgich left. Robert Mondavi had retained a consultant, Karl Werner, who was a German. To the best of my recollection, Karl came in '71. Mike left to go to Chateau Montelena and to become the winemaker there. Karl had evidently recommended that I be promoted into Mike Grgich's position of enologist. You know, I'm not honestly sure whether it was '72 or 73. Mike Grgich might be able to tell, because it was completely tied into his transition. I don't remember if his first vintage at Chateau Montelena was '72 or '73.

So that transition occurred, and I took over the winemaking. Karl was there, if I recall, for a couple of

vintages. His area of expertise was white wines, particularly Rieslings. He also had a long experience of winemaking, and he was a good consultant for me. I was still fairly young and green at the time.

Hicke: What kinds of things did you learn from him?

Long: All through that time, the thread through the early seventies was Robert Mondavi with general style directions and participation at the tastings. What I learned from Mike Grgich--I always felt that Mike instilled me with basic winemaking principles, so I learned my basic winemaking from him. Karl provided me, at a time when I had really been there for a short period of time and was then moved fairly quickly into a highly responsible position, with someone I could go to in a very specific situation and say, "This looks like a difficult situation. Here're the alternatives. Do you have any input you'd like to give me?" So I would say more than anything he supplied some professional, experienced input.

Hicke: That was a lot of responsibility.

Long: Yes, it was. [laughs] Although, you know, I really didn't think about it at the time. You know how it is; you just sort of--it was such an exciting business. It was really fascinating, totally fascinating. There really wasn't time to worry about things, because we were so busy trying to take care of an ever-increasing amount of wine and address all these issues of quality in winemaking, and go through organizational change and expansion. We were just on the go.

Hicke: What was the reason for this enormous growth?

Long: I think it was intrinsic in the industry at that time. It would be interesting to go back--I haven't done it recently--and just look at the grape acreage growth and the numbers of wineries. When I first started in the Napa Valley, there were very few wineries and not a lot of grape acres. So the basic reason was the consumer out there who really wanted to learn to drink wine and was excited about it. I think at the same time there was the beginning of intrigue with food and the quality of food, new restaurants, disposable income, travel, and wine as a measure of sophistication. Wine just grabbed other people like it grabbed me: "This is really fascinating."

That was what supported the growth at Mondavi, particularly that the wine quality was very good, the quality goals were high, and the marketing and sales energy were very successful; the wines had good publicity.

Hicke: What were some of your biggest challenges?

Long: I think really the organizational challenges were the biggest challenge. For example, in 1973 Robert Mondavi saw that there was a lot of Zinfandel in Lodi available for purchase, and he decided to purchase a lot of it. I think it was within a month of harvest. He had committed to a level of tonnage that was larger than we could actually store at the winery, so we had to find other storage facilities and prepare them to receive the wine--just the sheer logistics of doing that. There were always these organizational changes that went on, just every year, that demanded that we both improve quality and address these issues of growth and organizational change. That was the core of the job; that was the biggest challenge.

Hicke: Did you have to hire people?

Long: Oh, yes. Our winery staff grew. When I started in 1970, there were two of us, Mike Grgich and myself. By the time I left, there were in the winemaking department probably five enologists, a laboratory staff of five, and an experimental department of three people. There was constantly growing staff.

Hicke: You had to find space for the people as well?

Long: Oh, yes, there was physical growth. We had to find space for people, space for wines. During that time period the winery outgrew its ability to barrel-age the wine, so barrel cellars were developed in Napa. I think by the time I left there were probably fifteen thousand barrels, and when I first came there were probably three hundred.

Hicke: What about technology? Did you have to start with computers about that time?

Long: We did. Sometime in the mid-seventies we started working with IBM. They had what they called a process control computer, and they were interested in what processes in the winery they could control, which in fact were very few. But

we did develop a system to monitor and control fermentation temperatures. We worked on other systems, but that was the only thing that really became applicable. In fact, a lot of time was spent on that function, which I think was not particularly productive.

Centrifuging

Hicke: You talked a little bit about centrifuge; that was something new at that time?

Long: Right. We went through changes in pressing. I worked with three or four different kinds of presses. Nineteen seventy was the first year they tested the centrifuges, and through the seventies they were the primary means of clarification, although decanters, which are another form of centrifuge, were used towards the end of the seventies. I think in the early seventies there was this equipment fascination: "What can presses, centrifuges, filters, tanks, do for us?" As we worked through some of those questions and became more sensitive to quality issues, we were looking to a way to use these pieces of equipment as a positive tool without over-using them.

For example, when I came to Simi I didn't really want to centrifuge all of our juice. What I wanted to do was to let it settle naturally by gravity and then use the centrifuge as a backup tool. If there was a particular condition of the skins where they didn't settle, or we had a lot of grapes coming in in a very short period of time and there wasn't time for everything to settle, the centrifuge could get us through a difficult period. But it was really sort of an aid rather than an integral part of every wine.

Hicke: Is that just because moving the juice around makes it that much more subject to changes?

Long: Wine is really sensitive. I believe that the more you accomplish up front, in a natural way, with the wine to better the wine--as the time has gone by, that would mean moving clear back into the vineyard and saying, "What can we accomplish in terms of grape ripeness, condition, and balance in the vineyard first that will minimize any special handling that we have to do in the winery? Then if we need to do

something in the winery, what can we do right at the beginning before the fermentation?"

We were looking at acid adjustments in the case that the grapes were low in acid. Acid used to be adjusted toward the end of the winemaking process, and we've moved it up to the beginning of the winemaking process when you have juice, which is less sensitive than wine. The ideal now is to achieve the acid balance we want in the vineyard before the grapes are harvested.

People see it as a more natural handling of the wine; I see it as just kind of a natural development of the skill of the winemakers, more experienced, intuitive sense about what is the best thing to do with each wine. I would say that one of the basic principles of winemaking that I was taught by Mike Grgich was that the less you do with the wine the better; wine is really sensitive.

Hicke: That's standing behind this last little bit that you've told me, that if you've got it in the grape, and you don't mess with the grape--

Cooperage

Hicke: Barrel fermentation and care of the barrels you talked a little bit about with Margrit [Biever Mondavi]. Was that important?

Long: Yes. There were three important aspects of barrels. One was selection of barrels, one was their care, and one was the use of them. We experimented with use for fermentation with Chardonnay--the amount of new oak, the length of aging with any variety. We also learned a lot about how barrels are made and began to appreciate that the manufacturing style of the barrels would have a tremendous impact on the wine. How do you understand that, and how do you take that into account in the winemaking? During that time period we experimented with many different kinds of oaks--American oak and French oak from different forests--and we came to appreciate the kind of oak, the kind of seasoning the oak had had before it was made into a barrel, the technique of barrel-making, and the fact that all of those impacted the wine in some way.

We put a lot of attention into just caring for the barrels, keeping them clean and fresh. That's a basic. If you don't have good, clean, fresh barrels, you can't make good wine. Yet it took a long time to develop a really good system for keeping barrels in good condition when you're handling thousands and thousands of barrels. That was certainly as much the work of our cellarmaster at Robert Mondavi as myself, but it was a big concern of myself because the barrel care impacted the wines.

It's interesting about the industry---I think most people have a good system for taking care of barrels now, and you don't hear them say much about it. But when you go in to talk to a group of people who are new to using barrels, that's the first thing you talk about--how you take care of your barrels. If you don't take good care of your barrels, nothing else matters. It doesn't matter what kind of wood, what kind of cooper, what kind of wine; nothing else matters. So that's the beginning.

In the 1990s, the questions about barrels have been refined. There has been better understanding of some of the coopering techniques, and some of the nuances in coopering techniques are better appreciated. There has also been a development, which I think is really accurate, of the sense that the cooper is essentially like a winemaker. The cooper is selecting the wood, aging the wood, and developing the technique to bring that wood together in a barrel. All of those decisions, of which there are many, result in a barrel from the cooper that tends to have its own personality. So we tend to find an association of personality around a cooper, just like you'd find a style or personality of wine around a wine.

So winemakers are now thinking, "Which variety works with which cooper?" But they're going beyond that and thinking, "Which vineyard--"

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Long: They think about the barrel from a cooper as having its particular personality, and they're seeking to match that personality with a particular wine or a particular vineyard.

To come back to the questions of the nineties, they will be, "This Chardonnay--in this vineyard site, in this

vintage, with this certain style goal--needs barrels from which cooperage?" That's how it will be.

Hicke: [chuckles] Will the coopers start signing their barrels?

Long: The barrels are an enormously important and expensive part of our winemaking technique, and of the wines. They give complexity, structure, longevity, and flavor.

Hicke: When you talk about the technique of making barrels, do you mean things like how tightly the staves are fitted together?

Long: It can be the shape of the barrel, the thickness of the staves, the way the wood was aged after it was cut into planks and before it was cut into staves, how it was seasoned, the conditions under which it was seasoned. Then what is the shape of the barrel, what is the thickness of the stave, how are those staves bent to conform to a barrel, and how is the inside treated? Just to give you an example that we found at Simi, there's barrel called an export barrel that is a thicker-walled barrel than what they call a chateau barrel, which is the barrel they use locally in Bordeaux and which is thinner-walled. You put the same wine in both of those for a year and a half, and the wines are different. The thickness of the stave of the barrel has an impact on the wine.

Hicke: The oxygen?

Long: Presumably. Another thing is that, for example, in Burgundy the barrels traditionally are shorter and rounder, so to get the bend of the staves they have to spend more time over a fire. The inside of the staves generally have a kind of a toasted look to them; instead of a nice, light, oak color, they would be like bread in a toaster--kind of light brown. That difference affects the flavor of the wine.

There are many different ways to achieve that barrel shape. Some people dip the barrel in hot water and then fire it; some people use steam and fire; some people cover the barrel with a lid while they're firing it; some people use a small, hot fire; some people use a larger, cool burning. It's just incredible, the nuances, and what we found is that they all have an impact on the wine.

Hicke: How many different kinds of barrels do you have here now?

Long: I think every winery operates in the same way. Our system has been to work with some coopers that we really like and whose barrels really seem to go well with our vineyards and our wine personality.

Hicke: Are they local?

Long: No, they're European coopers. Our Chardonnay barrels are made primarily by François Frère in Burgundy.

Hicke: I saw that name on the barrels; they really are signed!

Long: Yes, they are. The barrels for Cabernet are primarily from the Taransaud cooperage in Cognac. We are constantly trying other barrels; I think we have probably eight or ten other barrel sources, and we may have anywhere from two to a hundred barrels from each source. It's a never-ending investigation.

Hicke: Yes, there are infinite numbers of combinations.

Long: Through trial and error we have established our main suppliers of barrels that work well for us for our vineyards and our wine style, and then we bring in other coopers to investigate [new possibilities]. We think they add complexity and keep a good frame of reference for the people we are using.

Vineyards and Grapes

Hicke: You were head enologist at Mondavi for seven years?

Long: Yes, until I left in 1979, right around harvest.

Hicke: Is there anything else about those years that we should be sure to discuss?

Long: I think we've talked about the tenor of those years, the change, the experimentation, the growth, the opportunity to work with grapes. Bob Mondavi brought grapes up from Santa Maria, grapes down from Washington, so there was opportunity to work with a real diversity. I spent more time in the latter part of those years in the vineyards, just so I could visualize each vineyard we were making wines from. About the

end of that time period I came to believe that we really had to know more about the vineyards; that we had appropriately addressed the winery questions, and we needed to really start developing vineyard questions. In that time period there was very little of that, very little.

Another thing in those years which epitomizes that was our way of paying for grapes. We had a pretty intricate system of Brix payment, that is, the sugar analysis of the grapes, and a payment relative to the Brix level. There would be some minimum Brix, and at the next highest sugar level there would be an increase in payment. Some sugar level would be a maximum, and then it would decline again. It was a system that in essence said, "The sugar is the most important thing in the grape." The other thing I saw in that system, particularly when I first came to Simi, was that it was a bad system [laughs], because it wasn't really true; the sugar wasn't the most important thing. You couldn't really say that every vineyard of Cabernet, for example, would be at its perfect peak of ripeness between 23.5 and 24.5.

That period of the seventies was still for everyone a period of growing grapes and making wine, so you had two different businesses; the end product of one was grapes, and the end product of the other was the wine, and there was the transfer in the middle. That was an important characteristic of those years, and by the end of the seventies there was really a need for change.

Hicke: So presumably you made that change when you came to Simi?

Long: At Mondavi my responsibilities were not viticultural; I didn't purchase the grapes, I didn't even make recommendations for what grapes to purchase. But basically out of my own volition, I did spend time with the grape buyer and saw the vineyards that we were getting grapes from. When I came to Simi, I immediately had responsibilities for grape purchase.

Just to go back to the seventies, I think there are a lot more things that could be said about that period, but I think if you look at it in a very general, evolutionary sense, I think I've covered most of it. There are some more specific things, which I addressed in my book about the winery.

Hicke: What I'm asking you is for the kinds of things that you put into it and got out of it, from your viewpoint, and you've told me quite a lot of that.

Winemaking Decisions

Long: I'm still thinking about what could be mentioned about the period of the seventies for me. In that time period there was even an evolution of varieties going on. When I first came into the winery, we were taking a lot of varieties--Mondeuse, Mataro, Carignane, French Colombard--that were necessary to get the Chardonnay and Cabernet that we needed. We were making Sylvaner, Zinfandel, and eight or nine different kinds of wines, and as we went through that decade, we really narrowed the kinds of wines that we were making. There were more and more grapes that became available for the kinds of wines that we wanted to make.

There were enormous changes in the actual winemaking process. One of the things we really didn't talk about in any great detail--the Cabernet winemaking, Chardonnay winemaking, Riesling winemaking, I think particularly in those varieties there was a tremendous evolution in the winemaking techniques. We talked about the equipment, about the barrels, and about some of the research, but those were all accessory to the central theme, which was each year, looking at each varietal, and saying, "How are we going to make Chardonnay this year? What do we think are the critical issues?"

I just want to come back to this. The flow is really, "What is it that we are trying to accomplish, and how does that evolve over time as far as wine style and quality?" And then, "What are we really going to do this year, and what are the sorts of activities that fall out from that?" The fallout might be research work, small lot work, trying new barrels, trying a new press. Again, all that stuff is tools, and the core, the theme, is the wine itself and the decisions you make.

The other thread that went through the seventies for me personally was just an evolution in my palate and my own

evolution of thinking what the vision of the wines should be. In a sense, when I came to Simi I had a pretty well-formed vision of Cabernet and Chardonnay that integrated a lot of my experiences. We did some really wonderful things with Riesling in that time period--developed some new styles of Riesling that of course I didn't bring over here, because we weren't making Riesling at Simi.

Hicke: How were those decisions made as you came in, as you looked at what you wanted to do?

Long: Except in the very early years, there were usually three or four people working all together, enologists. There was a pretty collegial atmosphere of winemaking, and I was the leader. It was really my responsibility to identify what I thought were the critical tasting decisions and to get the family involved in those. The family in the early years was Robert Mondavi, and in the later years it was Tim Mondavi.

Hicke: Just to make it very specific, you would come in and say, for instance, "This year we need to age the Chardonnay a little longer because of such and such"?

Long: No, it's not that way at all. First of all, your assessment of your wines and the process is continuous; it's constantly going on. There would be some point during the year prior to the next harvest where you would sit down with the people who were the primary people in the enology department and say, "Okay, based on everything we've heard, all the input--your opinions, the family opinions--what do we think are the issues with Chardonnay that we'd really like to address? Where can we improve? Where can we evolve? Let's talk about those, and let's talk through this process--through this winemaking for this grape--and see what we think are critical issues or new issues, and let's design some experiments, or let's recommend a new piece of equipment. Let's go and try something in the vineyard." It's a time when you bring out all of this stuff that's fermenting in your head and put it on the table, look at it, and draw up a game plan for the next year. That's the game plan, and that's related to certain quality and style goals.

Hicke: What about marketing information?

Long: Actually, that's something that I wasn't much involved in. There was some decision to make a certain amount of wine, and that was transferred to the grape buyer who bought those

grapes. It was my job to receive them and to make the wine.

The game plan is then turned into a specific set of actions every day. Every day you have grapes coming in during harvest. There's the decision to harvest, and then how are you going to handle those grapes from the time they appear on the scales to the time that they're shipped out of the warehouse in a case? The handling is related to this general game plan, but it's always being fine tuned to any particular circumstance at any particular moment.

I've never been a teacher, but I can envision that it might be the same if you were a teacher. You are assigned a certain game plan for a semester, and you need to cover this material. Let's say you are pretty happy with what you have been doing, but you want to maybe achieve something slightly different with this class, so you're going to modify your teaching a little bit and employ some new techniques. Then the class arrives, and you may completely change what you're doing or modify your plan, or you may modify it for particular people. It's the same thing with the grapes.

Hicke: That's a good analogy. You respond to the conditions as well as to your game plan.

Long: Exactly right. You are absolutely responsive on a minute-by-minute basis.

There are two more things before I go into the eighties. I was able in the seventies to go to Europe. In 1973 my husband and I went to Germany with Karl Werner and really looked at the German wine industry. In 1976 I went to Germany and France with André Tchelistcheff and a group of winemakers and visited Burgundy, Bordeaux, and Champagne. Then in 1978 Robert Mondavi made his first big trip to take his staff with him, and again we visited Burgundy, Bordeaux, and Champagne and Germany. In 1979 my husband and I and some friends spent a week in Burgundy. So in that decade I had substantive international experience, and that was very important to my own basic development, contribution, and concepts.

The other thing that's really important is this development of your palate--this combination of what you think you want to create and your ability to taste if you are really doing that or not.

Those are core issues, whether we are talking about seventies, eighties, or nineties: the vision of style and quality, the ability to perceive that and taste that, and then the ability to bring together the techniques--the people, the equipment, the grapes, and the process to create that wine.

When I came to Simi, I think it was a really good time for me, because I evolved; these concepts that I've been telling you about were pretty well formed. I knew; it was easy to come here, and it was clear what needed to be done, given the goals of the winery. I identified the crucial issues as the winery and its equipment, which are your tools; the people that you hire--the staff and the structure, which are ultimately the most important; the grapes; and the winemaking technique and process. Winemaking technique and process were fairly well formed for me, but the grapes were a big question mark because I hadn't been active in grape acquisition.

That brings us into the next decade.

Hicke: Let me back up and ask a couple of things. Was the stimulus for the change in the grape varieties consumer demand, or was it the winemakers?

Long: It would have been consumer demand. It's ultimately economics. People who grow grapes will grow what sells the best for the highest profit, and that's going to be whatever grape it is that the consumers are looking for out there in the market. For the most part, in the last twenty years that's been Chardonnay more than any other grape.

III MOVING TO SIMI

Deciding to Join Simi

Hicke: How did you hear about Simi, and how did they hear about you?

Long: I first heard about Simi through a friend I met in 1976 when I went on this European trip with André Tchelistcheff. I met Mary Ann Graf, whom I had heard of for many years, because she was known to be the first woman who had graduated from the enology department at UC Davis. Although I had known of her, I hadn't really met her until this trip, and we became very good friends. She was the winemaker here at Simi from '72 or '73, and she had left Simi in early 1979. I was aware of that, and that was about all, without giving much thought to it.

Then I was approached by what I guess you would call a headhunter, who said that Simi was looking for a winemaker and that they had plans to make substantial investment in the winery and to change and evolve the wines. They were looking for someone to direct that program, which was interesting to me. I hadn't worked in Sonoma County, and although Simi was known to have produced some good Cabernets, it wasn't, in my perception at least, an active winery on the cutting edge in the seventies. But what he was describing was interesting enough to consider it.

That was how it happened, with this opening discussion and the description of an opportunity. The opportunity that is always wonderful for any winemaker is this ability to bring all the elements together. At Mondavi my focus had been primarily the winemaking, so here was an opportunity to bring

together the grapes and the winemaking process, the people who were involved in it, and the equipment, and they were talking about building a new winery and a new cellar and so on and so forth. That was a very seductive thing to consider, naturally, for any winemaker.

In the course of talking about it, it sounded like a really good opportunity. Those kinds of opportunities in our business have traditionally also been risks, because it takes a tremendous amount of capital to do those kinds of things. Many times individuals with really good intentions as winery owners or managers but without a realistic grasp of the investment, you know, lay out a set of plans and expectations and are not able to carry them through. That was the risk that I was taking.

Hicke: After you talked to the headhunter, whom did you talk to?

Long: Michael Dixon, who was the president of Simi, and after that the members of his board of directors. That happened over a period of probably four to six weeks; there was a fair amount of time to think about that and consider it. Then I took the job.

Hicke: Do you know what it was about you that they particularly wanted?

Long: I know in retrospect that they were looking at several different people. It was my understanding that they were basically setting out in a new direction with a big investment, and they were looking for somebody who could manage that direction--set the direction and manage the investment. I figured I was of interest to them because I had had ten years of just constant new direction/new investment and every kind of experience one could have in the wine industry, in a winery producing outstanding wines with a great reputation. In my mind it was simply whether I wanted the job or not. [laughter] It never occurred to me that I wouldn't be the best candidate--never. It was just never my thinking. My thinking was really always focused on, "Is this what I really want to do?"

Hicke: Do you remember somebody calling you up and saying, "Do you want the job? Can you start tomorrow?"

Long: I really don't. I think those kinds of things evolve. You interview a group of people, you narrow down to the ones you like, and you talk to them some more. It seemed pretty natural.

Simi Winery in 1979

Hicke: Could you describe the winery and the status quo here when you came?

Long: When I came there was this old stone building, and it was the only building, so all of the winemaking functions--the tank fermentations, the barrel fermentations, the barrel aging, the tank storage--were taking place in this building. Next to the building on the west side was a large area that had been excavated in anticipation of building a new fermenting cellar. The first year I was here, the fermentation tanks for the red wines were big, open, redwood vats that held about forty tons, and some stainless steel tanks. Considering that they were doing--I think that first year they did thirteen or fourteen hundred tons--there seemed to be a very small number of tanks to receive and hold that tonnage.

There were some old Vaslin presses, there was the warehouse, and that was pretty much the physical status. I came in the middle of harvest, and my job was not primarily to run harvest but to do the planning for this fermentation building that was supposed to happen the next year. André Tchelistcheff, who had been their consultant, was here, and he was running harvest, so during that first month I really turned my attention to the plans.

Simi Winery

Left: Visitor center tasting room, 1991

Below: Visitor center, 1991

Photographs by Carole Hicke

IV GROWTH AND DEVELOPMENT OF THE WINERY

Equipment

Long: I immediately increased the size of the building.

Hicke: Why did you do that?

Long: I had quite a bit of practice at Mondavi in gauging fermentation space needs. As we had expanded our crush, I had developed some very good systems for estimating the number of gallons of additional cooperage that we were going to need to handle--how you go about figuring that out. I laid out a fairly complicated set of assumptions based on the number of tons that Michael presented--the varieties, the expected delivery dates--and just developed a system that identified the total capacity and the tank size.

Hicke: They were just going by guess and by gosh?

Long: They had some basis, and I honestly don't remember what it was. It was part of the expectation that I was going to come in and look at all of this, so I did. We very quickly hooked up with an engineer and a contractor and began to turn these plans into an actual draft with floor plans and drawings. I spent an enormous amount of time on the plans. The building was built starting in the late spring of 1980, so between the time I came in September until April was all the concept, the specific development, the ordering, the specification--and I had to specify and order all the tanks, hoses, barrels, pumps, presses, and so on--the development of the construction drawings, a lot of the mechanical engineering details, design

of the laboratory, and a lot of things that aren't very glamorous.

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Long: I believe that in a winery efficiency is quality. At the time of harvest you have people working in the winery, and there are only so many hours in a day, and there is only so much physical energy. What you want your people to do is to turn that physical energy to the things in the winemaking that make a difference in the wine quality. For example, in running the press you want them to be concerned about how the press is operating, about the change in the characteristic of the juice as it's coming out of the press and how they're going to respond to it in the operation of the press. You don't want them to worry about whether the press is running or not or how they're going to get the pomace out of the press. It goes back to the barrel care: there are some basics that you have to get out of the way before you can really do sophisticated winemaking.

The design of the cellar is so that it is efficient: the floors drain, there is enough space in the aisles to work, there are enough places to plug in your electrical cords, there is hot and cold water at all the right places, it's safe to work there--all of those things that make it physically flow during harvest. Those were a lot of the issues that we were addressing.

Hicke: It sounds like it's kind of like learning to drive; you have to fiddle with all of these details until it becomes a routine and you can do a certain amount without thinking.

Long: It's not that different from designing a home. Let me come back to the design process, since that's what I was doing at the time. What I really started with, in working on the winery design, were two things: what were the kind of grapes and the volume of grapes that Michael wanted to crush, and how did I think we should be making the wine? So the actual winemaking process--from that picture, everything else flowed. The number of tanks, the type, the size, the number of barrels, and all of the details flowed out of the picture of those issues--how to make the wine, and how much wine you're going to make.

Hicke: How did he make that decision? How did he come up with whatever he wanted to make?

Long: He didn't address himself to how the wine should be made.

Hicke: No, that was clearly your--

Long: He would have been doing that with the marketing--with the company that owned Simi.

Those were the design issues, and I liken it again to designing a house. As an architect will tell you, the right way to design a house is to think about how you want to use it, how you want to live in it, what it wants to feel like, what are the functions you want to do. Do you like to cook? What do you have in your kitchen? How do you want to work? Where do you want to store things? When you answer the big questions, then the details fall into place. But a house is eminently more liveable in the degree of details you have addressed. Do you have a place to store everything? Is it accessible? Is it well organized? Just so many of those things, and the winery is exactly the same way.

Once we had established what to make and how, I was working on the practical details of making that possible in a working environment. I had a professional associate, Barbara Lindblom, who had worked for me as lab director at Robert Mondavi and then left to go to Europe. She came back right about the time I was doing the design, and I hired her as the lab director. She did the specific design of the laboratory, because the laboratory is really like a kitchen. It's an extraordinarily complex small space.

The other thing that was a benefit at Robert Mondavi was working with winery design engineers enough to recognize that they really don't know very much about winemaking processes, and therefore can't be counted on to really design a functional winery. At Simi we didn't have an architect. We had an engineer, and he addressed himself to structural issues and to the drawings--pulling the whole project together and creating the construction drawings. I had a mechanical engineer who helped me work through all the electrical, water, and mechanical systems. There was also refrigeration; I had to figure out how much refrigeration we needed and then select a system that would provide that refrigeration. That was a big investment.

Hicke: You had an architect--it was you.

Long: Right, and it wasn't that difficult. I had a tremendous amount of background to bring to bear to that project. It was a lot of things to do in a short period of time, but it wasn't difficult.

That took place in 1980, and by the harvest of 1980 we had that new fermentation cellar complete and did our first harvest there. At the same time I had been out in the vineyards and looking at the grapes, so that was the first year I was really able to pull together the grapes and the winemaking. That was a year where we had new grapes, a new building, new people, and new techniques, and we were putting them all together. It was really exciting.

Hicke: Did you make decisions about the varietals at that point, or did that change more slowly?

Long: When I came to Simi we were making Gewürztraminer, Zinfandel, Gamay Beaujolais, Pinot Noir, Cabernet, Chardonnay, Rosé of Cabernet, and Chenin Blanc--eight varieties. After 1979 what did we make? I can't remember. I think 1980 was the last vintage of Gewürztraminer. We dropped Gamay Beaujolais; '79 was the last vintage of Gamay Beaujolais. Zinfandel we continued through 1982, and Pinot Noir I think through '81 or '83; I can't remember.

Certainly in that time period there was a lot of discussion about varieties and which ones we didn't want to continue, and in that time period we picked up Sauvignon Blanc. By 1983 we had rationalized the varieties that we were producing.

Hicke: So that really didn't affect the kinds of equipment or the amount of space you needed? Or did it?

Long: We did continue to change the physical features of the winery, as you always do. I mean, you never stop. But we did another big project in 1981; we renovated this stone building. We completely took the cellar out, gutted the top level, put complete new floors in it, and did a lot of structural change, again with structural engineering supervision, to make the building more solid and to make it more space effective. It had been a fermentation and aging center, but it was transformed into primarily a barrel-aging building, which it's very nicely suited for, because it's set back in the hill, part of it is underground, and it's got these wonderful, thick stone walls; it's great for that.

That, in a way, was a much more complicated project than designing and building the fermentation cellar, because you are working with something that is already there, and it has a lot of limitations--and a lot of opportunities. We spent a good deal of time on that, and it was a major project.

People

Hicke: We've talked about the winery equipment; what about people?

Long: When I came, there was a cellarmaster and four or five people working in the cellar--the cellarmaster's assistant and a couple of cellarmen who doubled working on the bottling crew, warehousing, and so on. The person who at the time was functioning as my assistant, Chris Markel, left and went to Piper-Sonoma [Cellars] to become their sparkling winemaker, so I hired an assistant winemaker in '81. We had a much more expanded laboratory function, so I had a laboratory director and a microbiologist to work with her. One of the people who had been here in the cellar, Bill Biggers, was promoted to cellarmaster, and our cellar staff expanded as we grew.

One of the things that really created the expansion in personnel was the barrel aging. We haven't grown an enormous amount in tonnage--we were crushing 1,300 tons then, and now we're crushing 2,600--but in those days a very small proportion of that tonnage was barrel aged, and now almost all of it is. I would say it is over a tenfold increase in barrels, and barrels are much more time-consuming to work with; they take more labor, and they make a completely different kind of wine. Part of the transformation in the winemaking process itself was to move the wines out of these big redwood tanks where they had been aged and move them into a French-oak-barrel aging process.

As a result, we really expanded our cellar staff and hired quite a few new people in the early eighties. A large number of those people are still here. Right now at Simi we have an enormously experienced and talented cellar staff, just a fantastic crew. Winemaking from a cellar perspective--the people who actually receive, crush, press, rack, chill, barrel, clean--they are the people who are physically making the wine. Their expertise has an enormous bearing on the

intrinsic, basic quality of the wine. That's another one of those basic building blocks of quality.

Through the years our laboratory has expanded, but not a great deal. In the ten-year time period, particularly relevant to the issues I was telling you about vineyard, we've developed a viticulture department. When I came there was no one; I was buying the grapes. If there was anything to do with grapes, I was doing it, and now we have a viticulturalist, Diane Kenworthy, who started here in 1981 on a part-time basis and grew that job. She has a full-time assistant and a part-time assistant. We've worked very much through the years in developing a very strong link with the vineyards to address some of these issues, which I'm sure we'll get into.

Developing the team and putting it in place was very much a part of the work of the early eighties.

Hicke: Did Michael Dixon have ideas about the people he wanted or the kinds of people or the numbers of people?

Long: No, he didn't. He was a real pleasure to work with, because he would provide an outline of the goals and the direction and then let me take it from there. The working relationship was really effective. The style at the Mondavi organization was that a lot of people were involved in decisions, so to implement a decision was very time consuming because so many people had to participate in that decision. When I came here, the only person who really had to participate in the big decisions was Michael--[such as] the decisions on kinds of presses. I could involve my people, we could come to a conclusion, I could make a recommendation, and then we would go with it.

It was a wonderfully effective way of working, sort of, "Let's think about it; let's think why we want to do it," and then, "Let's do it." Of course, he would look at the reasons; if I had something to propose, it was "Why?" as any good executive would want to know. But he was a very supportive person to work with and also very good in terms of this quick ability to come to decisions and take a direction.

The Must Chiller

[Interview 2: September 24, 1991]##

Hicke: Yesterday we were talking about the status of the winery when you came. We had covered the people and the equipment, so today I thought we could talk about the grapes and the winemaking. But there's one thing I wanted to go back to, and that's the must chiller that you started. Can you tell me about that?

Long: To step back and talk conceptually, when you start something new--in this case it was building a fermentation cellar; in other cases it's starting a vineyard--you have an opportunity at that time to look at new ways of doing things. In 1980, when we were designing the fermentation cellar, as I said yesterday, we started with how much wine we wanted to make and how we wanted to make it, and what falls out is the particular equipment. But there were a lot of changes that were made in that new cellar design. One, of course, was just to provide much more fermentation space, which allowed us to receive our grapes when they were ready to harvest.

One of the big decisions in designing any winery is how many tanks you want to have. If you have a larger number relative to the number of tons you're going to crush, it allows you to receive grapes in a shorter period of time. If you have x number of grapes to crush--let's say a thousand tons--you can choose to have several different levels of fermentation space. The greater space you provide, the more it allows you to take in grapes in a very short period of time. What that means is that in a few years, oftentimes one out of ten, you have weather conditions--sometimes it's heat, sometimes it's rain--that drive the harvest of the grapes and make it critical to bring in a lot of grapes in a short period of time.

We were fortunate to be able to afford to have a large amount of fermentation space to allow us to bring all grapes in quickly if needed. What happened in 1984 was that we brought in 90 percent of our grapes in three weeks, where a normal harvest period is six to eight weeks. The important things in that original cellar design, as I talked about yesterday, were to be efficient and to be good for the people who work in it so they could focus their energy on the winemaking, thinking about the wines rather than worrying

about whether the equipment was functioning, if they had enough equipment, if it was properly designed to do its job.

The new fermentation cellar had several newly designed pieces of equipment. One was our system for pomace removal of the skins and seeds, which was a blowing system instead of a screw conveyor. The benefits of that had nothing to do with wine quality, simply ease of handling and safety. We also put in overhead tanks, which allowed us both to do skin contact where we needed it and to hold grapes for our presses as we went through our press cycle.

Then we put in the must chiller in 1981. The reason for the must chiller was first the observation that in European wineries usually the harvest is later, the temperature is cooler, and the grapes come in cold. In our conditions the grapes are often cold in the morning--they're usually fifty or fifty-five degrees until about noon--but after the sun comes out and the grapes warm up in the afternoon, they can be eighty or eighty-five degrees. That's very dependent on the weather. This year, 1991, they will be very cool when they come in.

I believed that made a quality difference, so we were able to invest in this must chiller that allowed us, as soon as the white grapes were crushed, to chill them down.

Hicke: Did you design it?

Long: Larry Alary, who owned an industrial refrigeration company in Healdsburg (IRAP), designed it to meet our needs.

Hicke: But there was no such thing before this?

Long: Yes, there were. There were a few must chillers around, but very few. The use of the must chiller was not a part of normal premium winemaking in California at that time. It has become an intrinsic part since then.

Hicke: Is it for the same reason that people turn to night picking now? You can do one or the other?

Long: I had a new winemaking assistant at that time, Dave Ramey. He had just graduated from Davis and had just finished his master's degree, if I recall correctly, and he did some

research for me on this must chiller. That year we took grapes--the same grapes, Chardonnay--in at four different temperatures: a normal field temperature--we selected a hot day, so it was relatively warm, roughly seventy-five degrees--a little cooler, sixty-five; a little cooler, about fifty-eight; then a little cooler about fifty. So there were four different temperatures, and of course we used the must chiller to get the temperatures down.

We held the grapes in our overhead tanks for twenty-four hours, and during that twenty-four-hour period we took samples, so we could see how the juice changed depending on the skin contact temperature through that twenty-four hours. Then we made wine from them.

Hicke: Keeping them separate all this time?

Long: Keeping them separate the whole time. We noticed two things. First of all, we noticed that the phenols--the compounds that give wine its body and some of its aromas, and if excessive can give astringency and bitterness--were extracted faster at warmer temperatures. We had known before that the longer the crushed grapes, skins, and seeds were together, which is the "period of skin contact," the more phenolic extraction you got. So we knew length of time was important, but this allowed us to quantify the role of temperature, and it turned out in these studies that temperature was much more important than time. We were getting in about two hours at a hot temperature the same level of phenolic extraction that we were getting in twenty-four hours at a cold temperature.

What we saw, then, which was new, was that temperature was more important than time. The reason it was important, related to our style goals--and it goes back to the concept that everything that you do and the judgments that you make have to be in some framework of quality and style--was that we wanted to make a more delicate, elegant style of wine. As we looked back at the Chardonnays of the seventies, they seemed a little big, a little clumsy, a little unsophisticated.

We followed these four wines for a couple of years, and what we saw was that in the first six months the wine made from the long, hot skin contact was the most interesting. It was immediately accessible, fragrant, and sort of rich and fat. The others were lean, tight, and closed. At the end of the year, that wine had gotten sort of heavy and clumsy, so by

the time it would have been released it had lost its charm. After a year the next one, the roughly sixty-five-degree skin contact, was the most interesting. It was open and with good body and flavor, but in time that deteriorated. What we saw was that the wine with the coldest skin contact, i.e., the lowest phenolic extraction, was the wine that really went the longest and in time opened up and became the most sophisticated and refined of those wines.

So we adopted that practice of chilling the must. And the other thing we did that was really important together with that was to eliminate the use of SO_2 in the juice. The practices of the seventies had been to add SO_2 to the grapes at the crusher to inhibit oxidation of the juice. We began to question that, saying, "We really don't want to use SO_2 unless it's doing something beneficial, and is it really beneficial to protect juice from oxidation?" What we found was that the SO_2 had a beneficial effect when you didn't have a must chiller; that is, when the grapes came in and they were warm, you could possibly have a wild yeast fermentation start up, and the SO_2 inhibited that. On the other hand, when the grapes came in and they were cold, you didn't need to worry about your fermentations; you were going to add the yeast, and it was going to take off in good time.

The other question was, "Are we really concerned with this oxidation of the juice?" What we found out was that if we allowed the oxidation of the juice to take place in the absence of SO_2, we got two benefits: one, we got lower phenols in the wine, a more delicate wine in the mouth, longer life; and, two, our malolactic fermentations were easier to complete. So the must chiller not only had an impact on the mouth feel of the wine; it allowed us to eliminate our use of SO_2 prior to fermentation.

So it wasn't just one thing happening; it was a group of winemaking goals coming together: achieving malolactic, achieving delicacy through lower phenolics, both by precipitating the phenolics through the oxidation of the juice and reducing the tendency of the juice to have phenolics in the first place by reducing the extraction from the skins.

The general direction that we saw at that time was that we wanted lower phenolic wines, although the winery we had designed in 1980 had allowed for fairly significant skin contact times. Our first change was to make the skin contact

cold, so we basically reduced the rate of skin contact significantly, and then over time we actually reduced the time. We went through a major evolution in the handling of the grapes. Of course, now we're experimenting with wild yeast fermentations. At the beginning of the eighties we were concerned about having wild yeast fermentation, and now we're intrigued by the possibility that they may add to mouth feeling complexity. That's winemaking!

It's an illustration that everything that you consider about winemaking has to be done in the context of what your wine goals are and what your grape material is. I've seen through the years people talk about some part of the winemaking process as right or wrong, and I've never felt there was truth in that. Right or wrong is always relative to the vineyard, the grapes, the vintage, the wine style goal. Winemaking is really a system of decisions; it's not a series of right and wrong decisions. It's a series of decisions that have to fit together in a harmonious way.

One of the lessons that I've learned is that if you are looking at the winemaking of a variety or of a site, you can't just change one part of it. Oftentimes if you change one part of it, the rest of the system has to change, so the series of decisions that are made in working with wine are a system of decisions; they're not a group of individual, isolated decisions.

Hicke: This discovery of the relationship of temperature to everything else was really crucial?

Long: It was crucial, and it was a major step in understanding. People say, "What about technology and science--how does it relate to winemaking?" It was an illustration that we had a piece of information. People at some level had intuitively thought that temperature was important, but we had a piece of information that really told us what was going on and how it affected the style. With that information, winemakers could choose to either use it or not use it, or to use it to some extent. That was a piece of information that would allow them to make a whole range of choices, once they had that understanding. The must chiller was basically a tool to allow us to impose those controls.

People subsequently found other ways to do that--night harvesting, and the amount of extraction you get at night is less because the grapes are cooler. But you have a choice

between night hand-harvest and night machine-harvest. You'll get more extraction with night machine-harvest than with night hand-harvest because the grapes are broken by the machine. There are other systems of chilling the grapes; some wineries have a cold tunnel that the grapes pass through. So people have found ways to take that information and adapt it to their own facility, their own style and way of thinking about the wine. But it was an important new piece of information.

Hicke: I know you do a lot of writing and speaking. Do you pass these kinds of things along that you have discovered?

Long: Yes. Over the years I've done an enormous amount of technical discussions through the University, through our technical groups, through Extension, and through some writing to communicate that information. I don't do that so much any more because I'm not in a technical position any more; I'm in a management position. I wrote several articles on those issues. [See appendix for list of articles by Long.]

Winemaking

Hicke: We have two other areas to cover: winemaking and the grapes. I think you told me what was being made here.

Long: One of the things I would want to say is that we're talking about these things separately--the people, the equipment, the process, and the grapes--but they're never separate, of course. For example, the decisions on the equipment that we were using involved the people who were working at the winery who had input on what we needed to use and how it should be designed. All of the pieces of winery equipment that we use that touch the wine--the barrels, the press, the crushers--have an impact on the composition of the wine. For example, if you were to buy a press for a winery, you have a dozen designs to choose from, and if you put the same grapes through those presses at the same temperature, and you have the same person running the presses, you'd get different result; you'd get different juices. That's why we give a lot of attention to the equipment.

That attention isn't just from the winemaker; it involves the input of the people who work with these pieces of equipment. For example, with presses at Simi: our very top

cellar people run our presses every year. They have a level of intuitive and observational experiential knowledge that is crucial if you're making decisions to change those pieces of equipment. At that time our cellarmaster was Bill Biggers, who had been at Simi for a long time and had a really critical role in the early evolution of the winery. Barbara Lindblom, as I mentioned, had come in and done all the design for the laboratory facility. Then, talking about the must chiller, Dave Ramey and his experiment--he didn't make the decision to do the must chiller, but it was his experimental work with it that really showed us how important it was.

So you just can't separate; these never come in individual pieces.

Hicke: That's good to point out, although I guess we have to talk about them separately.

Long: How specifically do you want to talk about the winemaking?

Hicke: I would like to ask you what it was here that was eventually changed, what were the important steps.

Long: If we're going to address the changes here at Simi--let's say for Chardonnay and Cabernet, because those were two varieties that were made then and are an important part of what we are doing now--the first thing was that we took a complete review of the wines themselves. The review of the wines, as I mentioned yesterday, wasn't just a one-time review in 1979, when the building was being designed, but an ongoing review and evolution. Even the wines that we made and wanted to make in 1980 aren't the same as the wines we want to make and are making in 1990.

Hicke: When you are talking about a review, you're talking about the wines that were here?

Long: I'm talking about a mental review. To come back again, winemaking starts with your vision of what you want to accomplish. You are saying, "What is it I want to do, and how am I going to go about doing it?" From those question flow the decisions about the process, the grapes, the equipment.

If you want to look at the physical changes, when I came, in the process with Chardonnay there was fermentation of Chardonnay in barrels, but it was limited. We dramatically

increased the amount of barrel fermentation for Chardonnay, we increased the amount of new oak that was used in Chardonnay.

Hicke: Was there any French oak there?

Long: There was some French oak, a relatively small amount compared to the crush. We moved to barrel aging all of the Chardonnay, a higher percent in barrels, a higher percent of new oak. We moved to the stirring of the yeast lees, we reduced the use of SO_2 in the juice and finally eliminated it, we started to do malolactic with the Chardonnay, we started to do some managed skin contact with the Chardonnay. We also developed new sources for Chardonnay grapes, and we developed a Reserve Chardonnay. So we basically completely remade the winemaking in terms of the grapes, the equipment we were able to use with the Chardonnay, and the process itself.

Viticulture

Long: In the early eighties, my concerns were getting more complex wines, and we did that by looking at grape issues, malolactic, use of oak, barrel fermentation. In the late eighties, our concerns have been texture and balance in the wine and flavor concentration. Texture and balance in the wine are to some extent vineyard and to some extent winemaking issues; flavor concentration is primarily a vineyard issue that we are looking at.

Another thing we've really looked at a lot in the eighties with Chardonnay is the impact of different clones of Chardonnay. We've had the good fortune to have some of our growers, primarily a couple, Glen and Mary Beth Dow, who decided, on our recommendation, to plant some different clones of Chardonnay in their vineyard. Since we've worked with their vineyard for ten years, we've had an opportunity to really understand how differently Chardonnay can express itself. It comes back to the idea of the different personality, different aroma and flavor characteristics. We've really studied the role of clones in flavor differences in Chardonnay.

I sat down and wrote for the Vintners Club book a pretty complete discussion about Chardonnay winemaking from a technical point of view.

Hicke: That UC book of wine has an article on it, too.

Long: The UC book of wine talked about changes in technology in winemkaing and the vineyard, and that was a more general discussion. [3]

Hicke: What is the the name of your book?

Long: It's Vintners Club: Fourteen Years of Wine Tastings.

The other thing that deserves a lot of mention with Chardonnay that we talked about yesterday is this issue of barrels. In the seventies at Mondavi we really looked at different oaks--Limousin, Nevers, and so on. In Simi in the eighties, we tended to focus more on different coopers, as I mentioned yesterday: what are the characteristics of the coopers, and how do they relate or add to the wine?

The other issue with Chardonnay that we looked at was ripeness--timing of harvest. This is partly a vineyard issue, but it's really important for winemaking, so let me touch on it. I mentioned earlier that in the seventies it was felt that the Brix of the grape at harvest was really the most crucial quality factor, and the grape payments were set up around Brix. As soon as I came to Simi and got out into the vineyards and started tasting grapes, I recognized immediately that there were other factors than the Brix or the sugar that were going to impact quality. Some vineyards seemed riper, ripeness being defined as a golden grape, a soft grape, flavor development. Some of the grapes seemed ripe at twenty-one Brix, and some grapes didn't seem to achieve that ripeness until twenty-three or twenty-four. It was clear that there were other things happening and that we had to expand our definition of ripeness far beyond Brix.

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[3]Zelma Long, "Enological and Technological Developments," and Zelma Long, "The Science of Growing Grapes," *The University of California/Sotheby Book of California Wine*, eds. Doris Muscatine, Maynard A. Amerine, Bob Thompson (Berkeley: University of California Press/Sotheby Publications, 1984)]. The Vintners book was a very focused discussion on Chardonnay. ZL

In 1981, Diane Kenworthy, who is our viticulturalist, came to Simi on a part-time basis. She began to work with me in the vineyards; she did the field samples. She brought with her a technical viticulture background, and we spent about five years developing a system to help us to say when to harvest the grapes. It was a system of sampling, collecting data--sugar, acid, pH; the sugar per berry--the actual physiological accumulation of sugar, as opposed to sugar that you see from rehydration or dehydration. We also developed a system for crushing the grapes and tasting the juice, and watching the change in the aromas, particularly of the juice.

What we saw was that there weren't any perfect numbers, but what was important in collecting data was the evolution of the grape. It wasn't, "Is the grape at twenty-one?" It's, "How fast is it changing? Has it come to a plateau?" It wasn't that the acid was at .9; it was, "How does the acid relate to the sugar at this particular phase of its ripening, and how does that relate to the pH?" It was more a study of trends and interactions as a basis for harvest decisions than specific numbers.

Hicke: Do you keep all these records on a computer?

Long: The records are still hand kept, but for many of our vineyards we have ten years of data that show all of the sampling for those vineyards--that show the average Brix and the acid and pH at harvest--so as we sample a vineyard now we can think about how those grapes taste, look at their relative numbers, and see what that means in terms of the past--how has that vineyard behaved in the past?

Hicke: So you look at the grapes for this year, for example, and say, "Oh, yes, they're about at the place where they were in 1984, and that was a good year." Is that how you do it?

Long: Not exactly. The past never provides the perfect template for a harvest decision this year. What you would be doing, for example, would be saying, "As we look at this vineyard, it tends to be ripe at a lower sugar and a higher pH as opposed to that vineyard." What you're really looking to do is, "Is this year similar or different?" If you took a decision in isolation--you had never worked with this vineyard at all, and you see it's twenty-one Brix and 3 pH--what does that mean? It's more meaningful in a context of past performance.

If you want to think of it that way, the harvest decision is--now I'm just talking about the sampling and the numbers, which is maybe 40 percent of the harvest decision. The other part of the harvest decision is what the grapes look like in the field, how evenly ripe is the cluster, what is the color, what is the texture, what is the condition of the vine, do we think the vine is going to be able to continue to ripen these grapes, what's the weather prediction, what does the grower think?

What we did was take a harvest model that was based completely on Brix and expand it to an essentially multivariant model, which includes Brix, TA [titratable acidity], and pH in terms of trends and relationships in history rather than in terms of specific numbers, and then visual observation in the field of color, texture, evenness of ripening, vine condition, etc.

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Long: And then input from the grower, and flavor development. So a very complex model. It's not a quantitative model; it's a qualitative model.

The whole system of assessing ripeness and the basis for ripeness decisions was the big change, not only for Chardonnay but for other varieties. That was something that Diane and I spent a tremendous amount of time developing in the early eighties.

Hicke: That sounds very complicated but very interesting.

Long: We were talking yesterday about the teacher model; you have a class, you have a game plan, you change your game plan. What I'm talking about with a vineyard would be very much like working with a person. If you met someone for the first time, and you didn't know them at all and were in some situation that required some action, you wouldn't have any basis on which to understand what they were going to do. If you worked with them for ten years and were in that situation, based on your observations from the past you'd have a better idea of their behavior. But it wouldn't be a perfect predictor, because their behavior is always going to be relevant to a new situation.

When we collect information about the vineyard, we develop a context in which we can understand the vineyard

behavior, but it's never a perfect predictor of how that vineyard's going to behave this year. This year is always a new year and always has to be looked at as a new year. It's true for 1991. Nineteen ninety-one is a season completely different in its weather patterns and the vine behavior than any season I've seen since I started winemaking in 1970. So the decisions of grape harvest and winemaking have to be taken differently, but at least, because we've got collected information, for one thing we know it's different. We'll have a chance to see how different because we have this other reference information.

When I was talking yesterday about the winemaking of the nineties, that's what it's all about. It's knowing the vineyards, knowing the vintage--the particular weather and soil, the characteristics of the year--and then saying, "What do I do?", knowing that it's never going to be the same from year to year. People say that's really complicated, but it's not that complicated. Everybody does that every day; they just don't realize it. And they do it primarily when they deal with people, because people are really complicated.

Hicke: That's a good analogy. I think you'd make a wonderful teacher because you have this way of explaining things.

Long: We were addressing the Chardonnay winemaking, and we talked about the changes. I want to come back, before we talk about the vineyard, and talk about the Cabernet winemaking and the changes. When I came to Simi, as I mentioned earlier, the Cabernet was fermented in these large, open redwood tanks with less effective fermentation control, pressed in Vaslin presses, and aged in primarily American oak barrels and redwood tanks.

So for the Cabernet there were many changes. Again, source of vineyard material for Cabernet changed very dramatically in that ten-year period. We started out with one vineyard, and then we expanded to an exploration of a variety of vineyards in Sonoma County. We developed our own vineyard in the early eighties, and that came into production, so by the second half of the eighties most of the Cabernet and Bordeaux varieties we were working with were from our own vineyards.

Hicke: Was that '82 or so when you started?

Long: We actually planted in '83. The vines came into serious production in '86. So the source of the grapes evolved, and the composition of the grapes we worked with changed, because when we planted our vineyard we planted Cabernet Sauvignon, Cabernet Franc, Merlot, and Petit Verdot. Those grapes, with the exception of Merlot, were not widely available, nor did we widely use them in the early eighties. So we increased the number of Bordeaux varieties in our Cabernet blend.

Hicke: Why did you do that?

Long: When you plant a vineyard, like when you design a winery, it's an opportunity to try new directions that you won't have after the vineyard has been planted. It forces you to stop and think about what's in the future with this variety, and I really felt that the future was with an expanded palette of varietals. That wasn't a new concept, in the sense that it was very much a European model, but was relatively new to California. Basically, those different grapes would give some kind of balance and complexity you couldn't necessarily get with solely Cabernet.

In that ten-year period the equipment that we handled Cabernet with--our crushers and presses--changed, so we were able to really handle the Cabernet grapes more gently, both in crushing and pressing, which is important, because a rougher handling of Cabernet tends to give more astringency and bitterness. Beginning in 1982 we looked at new techniques for mixing the tanks during fermentation.

Hicke: Mixing the tanks?

Long: When you're fermenting Cabernet you have skins, seeds, and juice together. The skins float up to the top, and you have to mix the tanks through the day in order to wet the skins and extract the materials in the skins. We looked at new systems for doing that in a way that would assure extraction but reduce astringency. We began those experiments in '82, and by 1985 we had converted to a more gentle extraction system.

So in the early eighties we were developing different pressing techniques and different extraction techniques during the time the Cabernet was on its skins. When I came in 1980, I didn't expect that we would be doing long macerations, but in the early half of the eighties we began to explore a longer

time on the skins after fermentation, for Cabernet, as a way to enhance richness, flavor complexity, and flavor life.

We dramatically changed our cooperage. As I say, Cabernet had been aged in redwood and American oak primarily, a small amount in French oak. We eliminated the redwood in the winery and moved to completely French oak aging, which was a dramatic improvement on the wines.

When Dave Ramey left as assistant winemaker in 1985 and a new assistant winemaker came, Paul Hobbs, he implemented some further changes, really beginning to look at press separation for Cabernet and to be more sensitive to acid additions--that is, reducing the amount of acid we were adding. In the mid-eighties he and I took a trip to Bordeaux, and we really re-looked at the whole winemaking process for Cabernet with a few key people in Bordeaux. The most important observation there was that the Bordelaise winemakers looked at Cabernet, from a sensory point of view, primarily for mouth feel and balance rather than aromatics. The whole sensory model for California had been aromatic oriented, I believe. At UC Davis there was a lot of discussion about wine aromas and different kinds of aromas--varietal aroma, off aromas--but there was very little discussion about texture, flavor concentration, flavor length, balance.

I think that without us really realizing it, the winemaking model of the seventies was an aromatic model. If you go back and look at the wines, you had a very intensely perfumed Chardonnay--buttery, woody--and you had an intensely aromatic Sauvignon Blanc and Cabernet. Those wines were dominated more by nose, and the weakness was in the mouth.

What we really began to do was change our whole model for winemaking from an aromatic to a mouth feel model, thinking about the important issues being flavor concentration--the amount and intensity of flavor; length of flavor--how long it stays in the mouth; the texture of the wine from the beginning of the time when you put it in your mouth, through the middle, and to the end; and the balance and interaction of components--the harmony, the mouth impression and how it relates to the aromatic impression.

I remember when we were on that trip in '86, we visited Professor Gayon, who was the chairman of the enology department at the University of Bordeaux. He said, "We believe that the nose follows the mouth; that if you have the

wine you want in the mouth, the nose will come along." That was the Bordeaux model of winemaking, and we adapted that. A tremendous amount of attention with Cabernet particularly, but also with Chardonnay, went to improving the mouth feel. Certainly in the second half of the eighties, when Paul came in as assistant winemaker and hired as his associate Tasha McCorkle, the two of them made an important contribution to our Cabernet and our Chardonnay in terms of texture, mouth feel, and balance. It was something they worked on a lot. They worked hard on that, thought a lot about it, and implemented techniques that addressed those issues.

By the end of the eighties, with different grapes in a completely rethought winemaking model and with revised techniques for Cabernet, we were basically making very different Cabernets from the early years. To me, in a way that's the essence of winemaking--that ability to continue to evolve in a positive direction. You've heard me talk already a couple of times about what I think that direction needs to be for the nineties.

Viticulture: The Vineyards

Long: We can go ahead and talk about the vineyards now. When I came to Simi in 1980, we had all of our Chardonnay and all of our Cabernet under long-term contract. One of my jobs was to review those grapes and see if we really wanted to have them. In the case of Chardonnay we did, and we continued our contract with our Mendocino Chardonnay, but as our Chardonnay program grew, we began to develop grape sources outside of Mendocino. With Cabernet we changed. We received grapes from one source in 1980 and '81 and then began to seek other sources for Cabernet.

So in those years from '81 to '85 I had an opportunity to explore Cabernets from many different parts of Sonoma County. It takes time to establish new vineyards and sources, but certainly by '85 we had defined the vineyards that we really wanted to work with. Cabernet was and probably always will be more difficult to find top grapes. I think one of the underlying reasons for the popularity of Chardonnay is that it tends to be relatively forgiving where it grows, so it can grow in a larger variety of soil and climate conditions and

produce attractive wine than Cabernet. Cabernet is relatively particular about where it's going to grow wine well.

I believe that in the eighties we were just beginning to understand what a good site was and what was good vineyard management technique.

Hicke: So you were looking for better quality primarily?

Long: Yes. And, as I said, not finding it really easy; there wasn't a vineyard every time you turned around that would meet the quality expectations. I think at the same time it's fair to say that we were not only looking for better grapes; we were developing our own understanding of what a better grape really was, what the conditions were that produced a better grape. It turns out that a lot of those conditions were viticultural. The vineyards we needed in the early eighties to produce superior Cabernet had to be vineyards that naturally did that. By the end of the eighties there were many people who had begun to apply specific techniques in a variety of sites that would help improve the Cabernet.

Simi hadn't had vineyards; when I came there were no vineyards. Simi had had vineyards pre-Prohibition, and then the vineyards were lost; they were sold to pay to keep the winery going. Michael Dixon, certainly with my encouragement, took a direction to begin to acquire vineyards for Simi. I asked that we look for Cabernet vineyards, because, again, I was finding it more difficult to buy good Cabernet. I felt that if we wished to grow something, that would be the variety to grow. I had found several grape sources in the Chalk Hill area of Alexander Valley--the southeast area--which I liked very much. When we heard of a piece of property becoming available and had an opportunity to buy it, that became the chosen site--after, of course, a lot of investigation and so on. Michael moved ahead and leased a vineyard that was contiguous, so between the owned and the leased acreage we ultimately had about 175 planted acres, of which 125 were the Bordeaux varieties.

The early eighties was a time of tremendous ferment viticulturally. When Diane came to work at Simi in 1981, we spent time together in the vineyard. For me it was these enormous questions of the vineyard: how do I figure out when the grapes are ripe? How do I know where they're going to grow best and under what conditions? I had quite a few viticulture friends in the Napa Valley, and I found that they

had the same kinds of questions. So in 1981 we had a post-harvest meeting at Simi, and we invited several of our viticulture friends and Dr. Mark Kliewer, viticulturalist from UC Davis. We put a lot of these questions out on the table. We said, "We really need you to do some research that would address these questions we have, which are essentially, 'What is it that we can do in the vineyard to improve wine quality?'"

Ultimately the answer was, "You can fund research." [laughs] So we, these wineries, formed an association--Simi, Domaine Chandon, Mondavi, Beringer, [Joseph] Phelps, Christian Brothers. We each put up money every year, and that money went into a joint pot. We asked the UC Davis viticulture professors to make proposals to us about research that they were interested in doing that would address the issue of, "What can I do in the vineyard to improve wine quality?" That association is still continuing, with some slightly different wineries.

Hicke: Does it have a name?

Long: It's the North Coast Viticultural Research Group. It has been a very powerful influence for a couple of reasons. One, wineries in the group were very powerful, they were respected as leaders, they also purchased a lot of grapes, and they had their own vineyards. We had so many questions in that time period--of course, Simi particularly, because we were starting to plant vineyards. Our questions were, "What do we want to do with this vineyard?" To go back to the similes, I've likened putting in a vineyard to building a house. I mean, when you build a house, it's a big investment, you have an opportunity at that time to stop and think, "How do I want to live my life? How is this house design going to suit that?" Then you build it. You can remodel it, but you don't want to rebuild it.

So starting a new vineyard provides a lot of opportunity of the same kind: what is it that you really want to look at in the next ten years? For us the answers were that we wanted to look at these different varietals, different root stocks, different spacings, different trellising, and different clones. So we established a vineyard in two phases that addressed all of those issues. Those were similar issues to the other members of this group.

What I think was happening, as I mentioned earlier, is that we came to the end of the development stage in winemaking, and it seemed like the most essential questions of the time were the vineyard questions. It was a very exciting period, because we would get all of these questions out on the table. We put in a close-spaced vineyard in 1984 which was one of the first close-space vineyards in California. Subsequently other wineries did that, and by, say, the mid-eighties, most of the group had at least some experiments in spacing, trellising, rootstock, clones, water relations. We would not only meet to fund and hear results of the UC Davis research work; we would exchange information about our projects.

What we were doing was deriving fairly quickly our knowledge of those aspects of viticulture and the impact on the wine by, as a group, developing projects and sharing the information. This wasn't managed; it just happened. People were so excited about these questions and these prospects that these things just happened.

Hicke: Was each winery doing something a little different?

Long: Each winery made its own decision about what it wanted to do. There was no group saying, "Okay, now we're all going to do this and that." But there was this tremendous flow of intellectual energy that resulted in a lot of different group projects.

Typically the research work that we funded was done in one of our vineyards. For example, right now Dr. Deborah Elliott-Fisk and Dr. Ann Noble from UC Davis are doing a study in Simi's vineyards on the effect of soils and vine canopy on Cabernet composition. That research is being funded by this group. Through the years we've funded research in the various members' vineyards.

Hicke: That packet you sent me is wonderful, so maybe we'll include some of that as illustrative material. [See appendix.]

Long: That would be terrific.

I'm talking quite a bit about this group, but I think it's a very important group. The other thing that I saw happen was that because we were asking the viticulture professors at UC Davis these questions, they were beginning to look at them more themselves. What we were doing was asking

them to evaluate their work in terms of the wine quality, so the end product wasn't going to be the grape; it was going to be the wine. We were looking at wine composition, the tasting of wine, the levels of phenols and the quality of the phenols as the end result of the viticultural work.

Hicke: You were stimulating the University's research.

Long: We were stimulating them, and what we noticed was that by, say, '83, '84, '85, they were doing other research projects that we were not funding that were addressing these issues. Furthermore, several of us were involved on a board level in the American Society of Enology and Viticulture, and we were involved in the planning of the technical sessions for that group. We created a part of the sessions, called the Forum, and we started to bring in people from around the world to discuss these viticultural issues. I think it was as early as 1985 that we had a symposium at Reno, where we brought in viticulturalists from around the world to discuss these canopy issues. So we were bringing in experts from outside the United States, which furthered this intellectual ferment.

At the same time, the wineries that were purchasing grapes--Simi, Mondavi--were starting to talk to their growers about things: "We're doing this, we're doing that; we like this, we like that," so the experiments that we were trying were spreading out through the industry. It's my belief that this very small group of people was the forerunner and the central cell that generated most of the early viticultural energy. The fact that we were looking at these things in our vineyards, that these were winery leaders, and that we were funding research and stimulating these questions on other researchers was a very powerful combination.

The viticultural issues elucidated in the 1980s were, I believe, most important for Cabernet. These were the issues of canopy management--in 1981, Richard Smart, who is a viticulturalist in New Zealand, came through and discussed the work that he had done, showing that if you changed the way that the grapevine displays its leaves you can impact the grape composition in terms of color, amount and quality of tannins, and flavor. This was an exciting new tool; we could train the vines, and we could have an impact on the wines. That was really explored in great detail through the eighties. Water relations--what are the relationships between the amount and timing that the vine gets water to concentration of flavor and to quality of the tannins?

With Cabernet in particular, the vineyard issues were ripe fruit flavors, i.e., moving away from the herbaceous, vegetative flavors that we saw more frequently in the early seventies and the eighties, to the blackberry, black cherry, cassis, very ripe fruit flavors of Cabernet--and ripe tannins. When Paul and I were in Bordeaux in 1986, we heard again and again this discussion of good tannin or ripe tannin. The Cabernet grapevine does have the ability under poor circumstances to produce very astringent tannins, so the goal was to display the fruit and balance the vine in such a way that by the time the grapes were ready to harvest, the tannins were ripe. It has nothing to do with Brix, not a lot to do with flavor, but really with tannin quality. That was partly in the viticulture and partly in the timing of harvest decision.

In the second half of the eighties at Simi we developed a link with a professor of geography and geology at UC Davis named Deborah Elliott-Fisk. She became fascinated with viticulture and the geography of viticulture. She came to our vineyards, and she began to help us understand the geologic origin of the vineyards and how that impacted the different soils in the vineyards. She helped us go through each part of our vineyards and explore the soils.

Michael Black, who is now vice president of vineyard operations, was the individual who really started the vineyard development in 1982. For example, in the mid-eighties, working with Deborah, he and Diane went through each one of our thirty-six blocks with a back hoe, dug pits, and came to really understand the characteristics of the soil down three to five feet. They began to be able to better envision the circumstances that the vine roots were experiencing and to respond to those circumstances with irrigation practices.

We started out in the early years looking at clones, spacing, trellising, and canopy management, and by the second half of the eighties we were really thinking about soils, water management, and nutrition management of the soils and how they affected the canopy, the balance, and the flavor concentration. We discovered that the site that we had chosen for our vineyards was, in Deborah's words, "one of the most complex, if not the most complex, vineyard site in Napa or Sonoma."

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Hicke: The map of your vineyard shows that each little area has a different composition.

Long: It's true, and we really didn't appreciate that when we bought the vineyard. We were buying it more because of the area and the climate than the soil. What that has meant to us is that it has given us a tremendous complexity and variety within that site, and it has made that vineyard very challenging to manage. [laughter] In that regard we've been very fortunate to have Michael Black, because he has really relished the challenge of seeing the vineyard as many different parcels and addressing each of those parcels as an individual.

Hicke: It almost looks like it's all experimental.

Long: It's almost all experimental; that's right. To some people in that time frame that would have been overwhelming. It would have been overwhelming to think of it in that way, but it really hasn't been to Michael.

There's something else in this. We are talking about vineyards, but underlying the vineyards in the eighties there are some important developments that transcend the vineyards. One is the rise of the viticulturalist. In the winery the winemaking is the successful interaction of the cellarmaster--he really directs the people and the operations of the equipment--and the winemaker, the person who is thinking about technical aspects of the winemaking process. I liken them to the architect and the contractor; the architect designs, and the contractor builds. In the winery you have the same kind of thing; the winemaker designs, and the cellarmaster implements, although it's never that clear-cut. I mean, they're always working in each other's areas, and to the extent that the relationship is successful, you make better wine.

We've been fortunate at Simi to make winemaking a joint effort, a team effort, as a priority. In the vineyards we've traditionally had the industry equivalent of a cellarmaster--the vineyard manager, who in the 1970s saw his end product as grapes, so he was concerned about a good crop and vine health and getting the grapes harvested. But in the eighties arose the role of the viticulturalist, which is more like the winemaker--a person who has technical and specialized knowledge for winegrowing, who can tie the winemaking and winegrowing together.

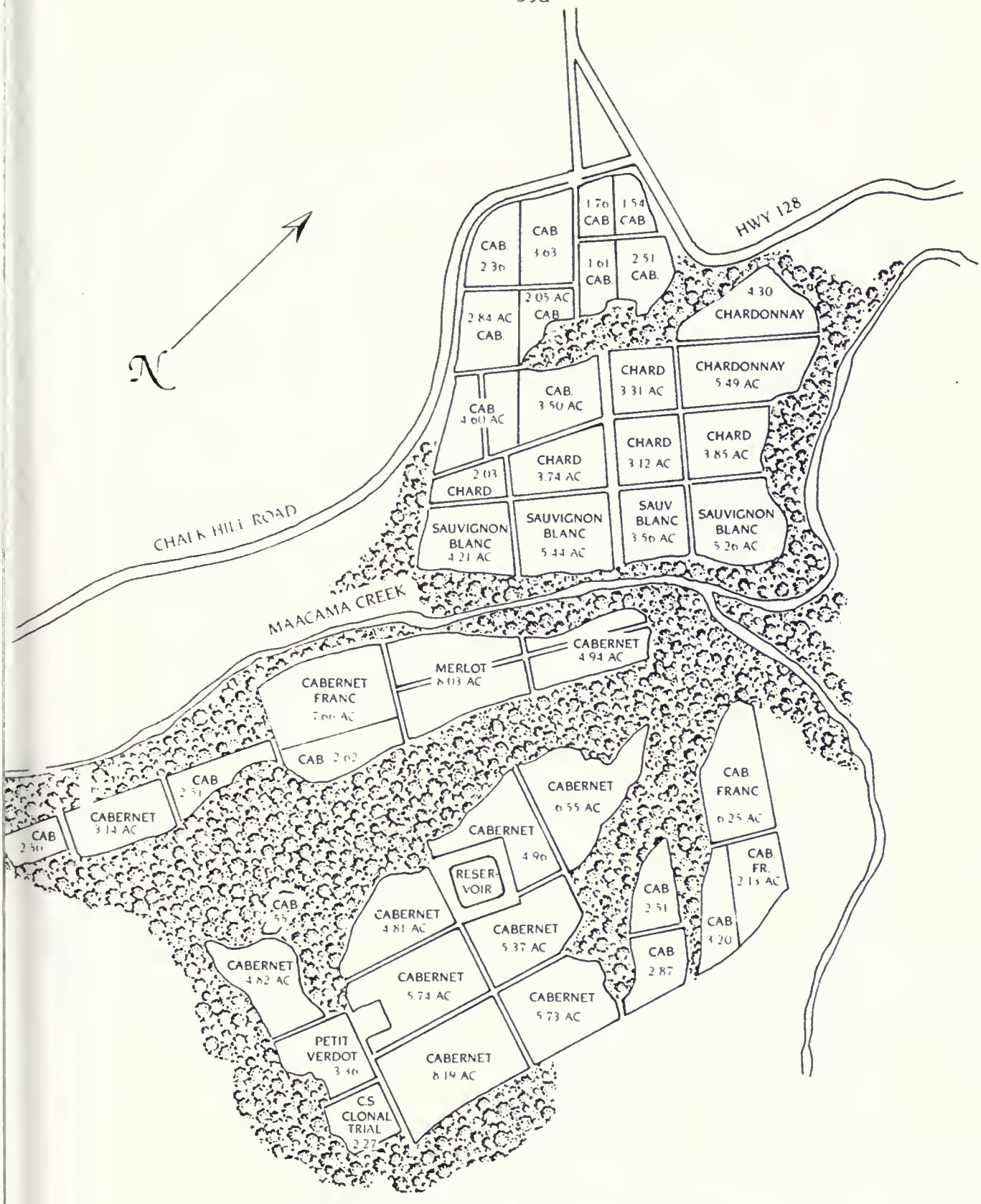
At Simi and at a few of the leading wineries in the eighties, the position of viticulturalist was developed. It was really a technical advisor to Mike and myself, who was both developing and implementing technical ideas. Diane was the person who was seeing the wine as the end product, then making suggestions about how to improve that wine, and working with Mike to tie the vineyard and the winery together. We were very fortunate again with Michael Black as someone who wanted to be tied to the winery and who saw the wine as the end product. It's really important to emphasize that these were mind sets that were unusual for that time frame--to have someone like Diane, who had a wine background, a love of wine, the technical training of the viticulturalist, and the love of the vineyard; and someone like Michael Black, who was the vineyard manager, who was interested in seeing his end product as wine, and who had a good relationship with the winery. They were role models, really, in that time period.

Management

Hicke: We're talking about leadership here, too--your leadership. This is about where you got into the management end of it.

Long: I would say probably at Robert Mondavi my greatest contributions were enological, but at Simi in a sense my greatest contributions have been viticultural--not that I was a viticulturalist or a vineyard manager, but I could see that enormous gains we were going to make in the eighties could be made in the vineyard. The way to do that was to begin to do the kind of research that was going to allow us to understand what was going on in the vineyards and to tie the vineyard and the winery together so that the wine became the end product--winegrowing.

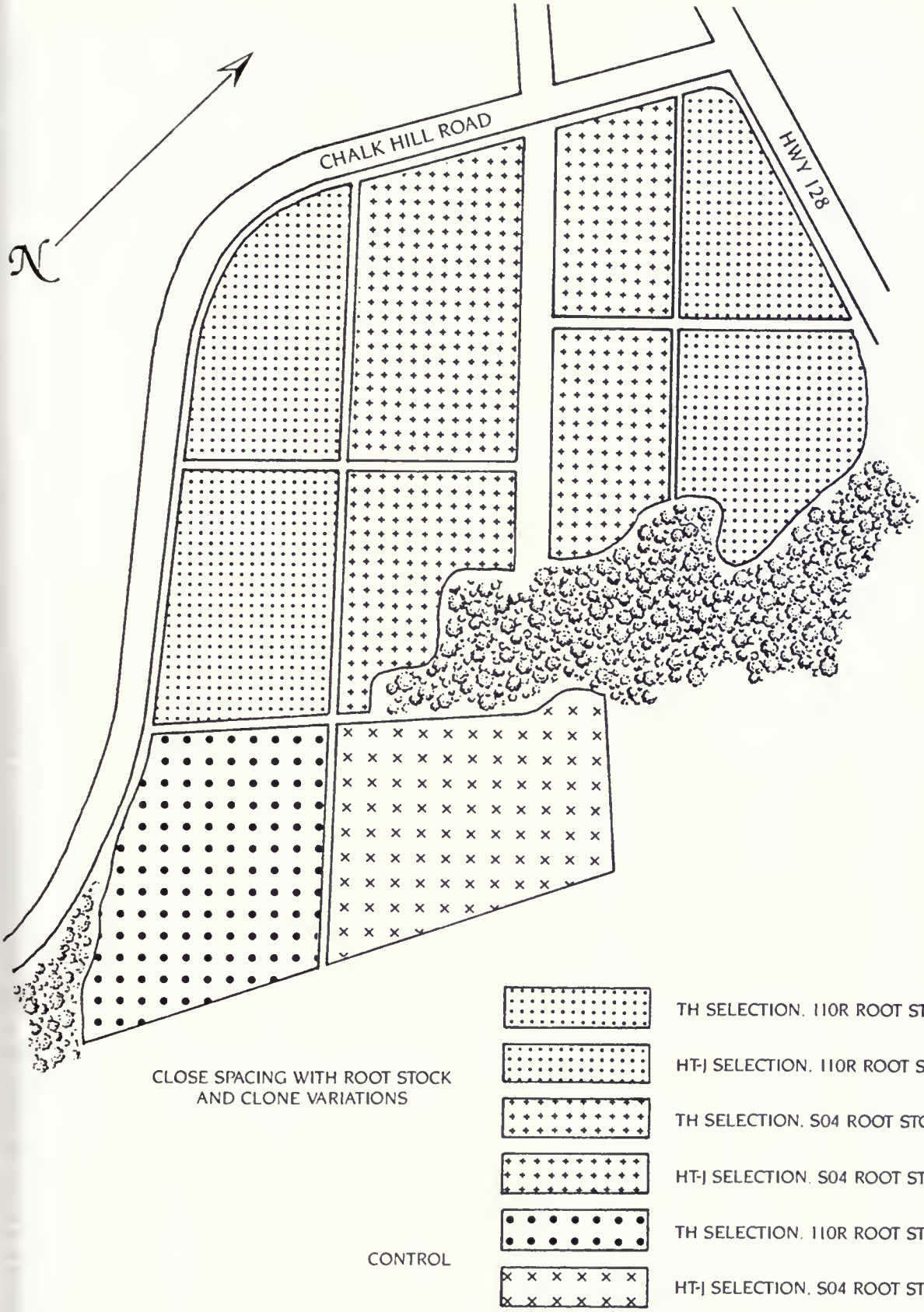
Certainly as I watched the industry change in the eighties, I saw winemakers become more interested in vineyards, but I still think there's a long distance to go. I think in the industry I was the winemaker most focused on viticulture in that decade. It was because I was personally fascinated by the vineyards and what we could do out there to impact the wine quality. The thread was the whole development of this new technical viticulture.



SIMI WINERY ESTATE VINEYARDS
ALEXANDER VALLEY, SONOMA COUNTY

Simi's estate vineyards are located in the southeast corner of the Alexander Valley appellation in Sonoma County. Planted between 1983 and 1985, all 174 acres are now producing. 99 acres are Cabernet Sauvignon, 17 acres Cabernet Franc, 8 acres Merlot, 3 acres Petit Verdot, 26 acres Chardonnay and 18 acres are Sauvignon Blanc.

1990

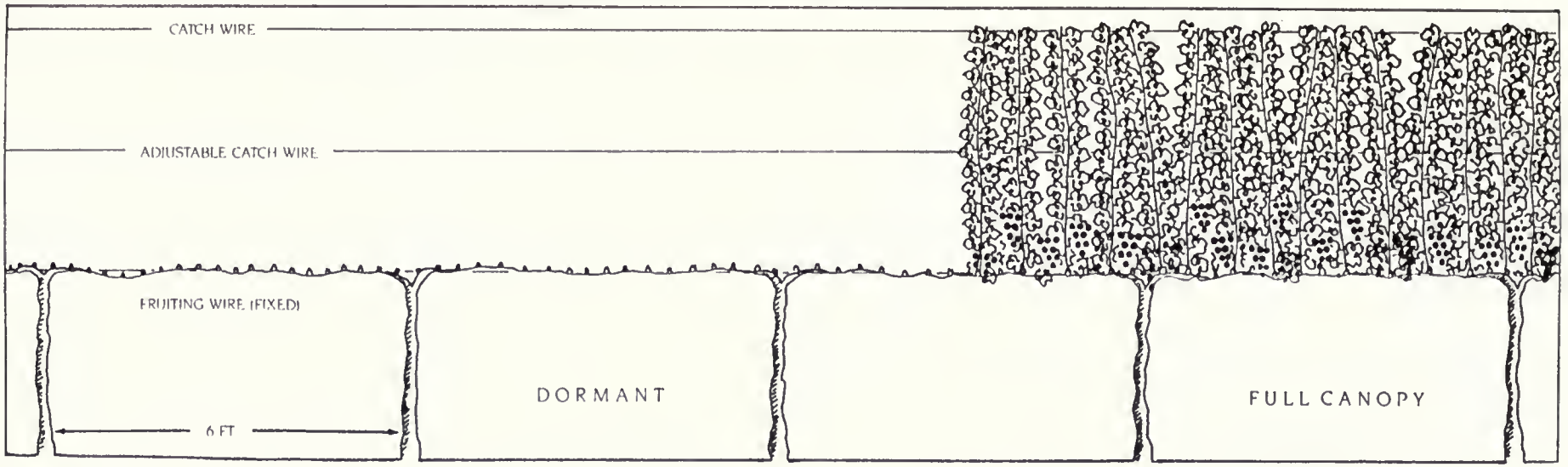


SIMI WINERY ESTATE VINEYARDS
CABERNET SAUVIGNON VINE TRAINING AND SPACING COMPARISON

Purpose: To compare viticultural and winemaking differences between the California standard

VERTICAL SINGLE CURTAIN TRELLIS • STANDARD SPACING • Side View

SIMI WINERY



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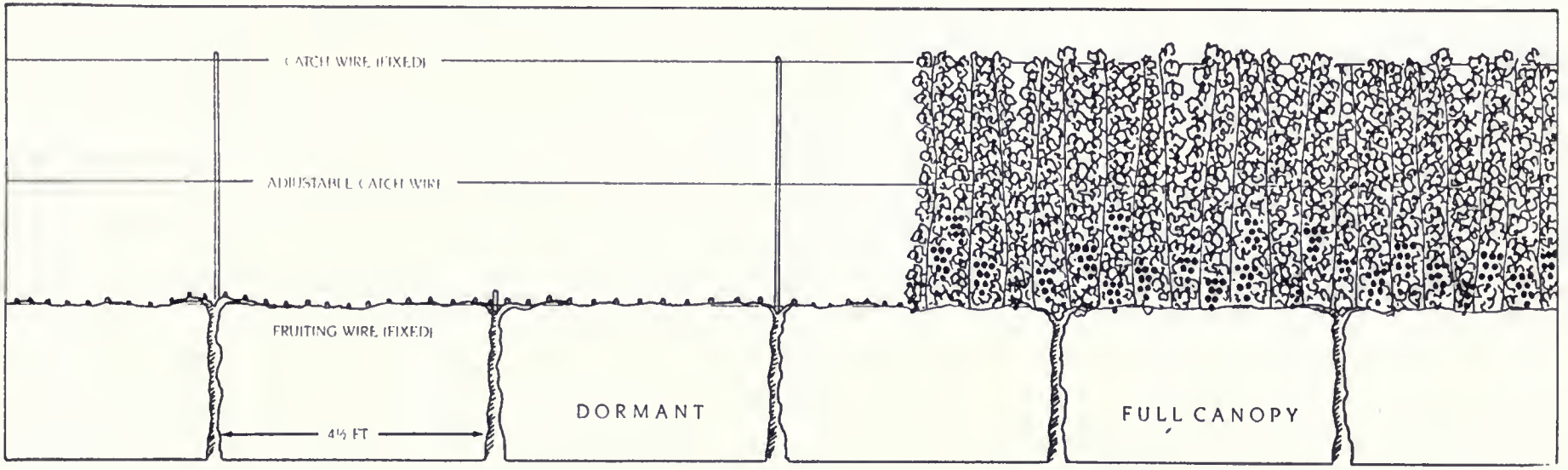
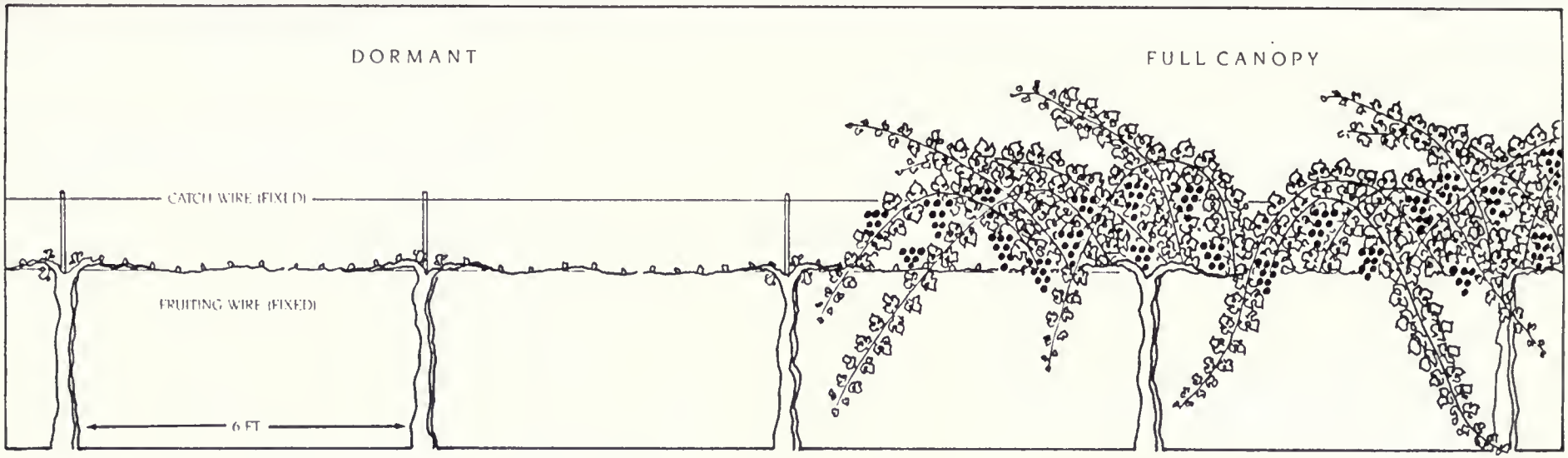
VERTICAL SINGLE CURTAIN TRELLIS • CLOSE SPACING • Side View



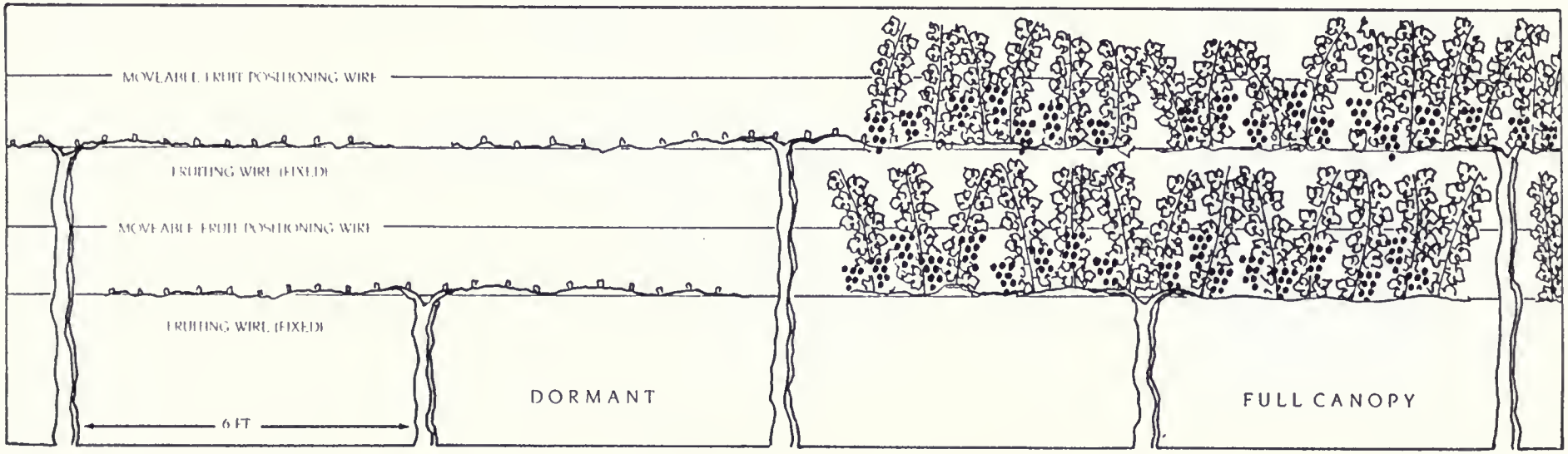
1990

CALIFORNIA STANDARD TRELLIS • Side View

SIMI WINERY



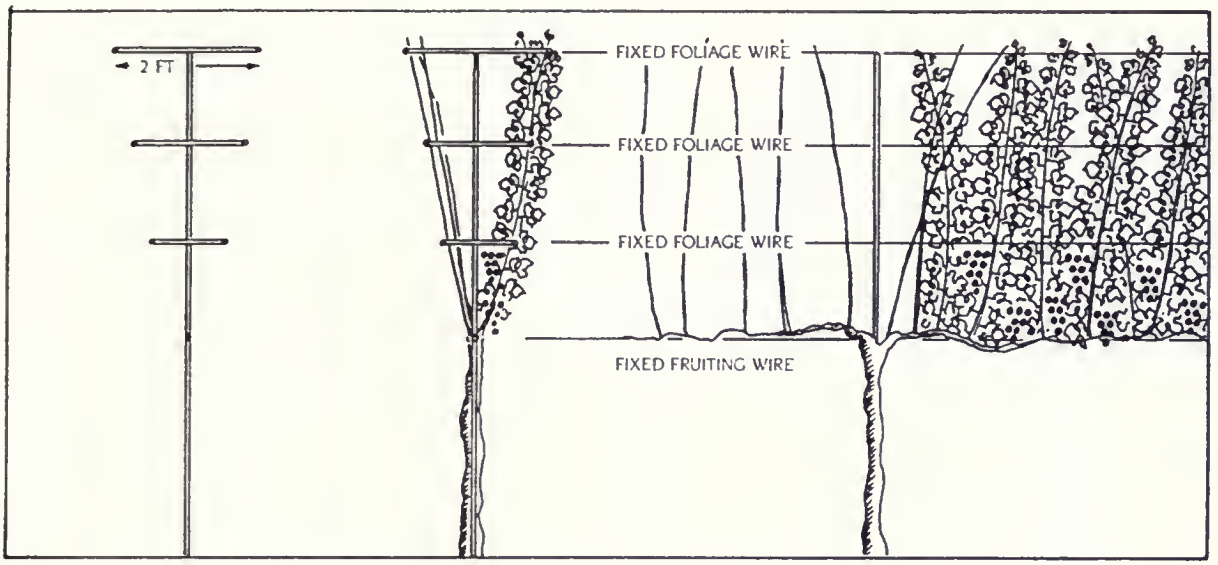
TK2T DOUBLE TRELLIS • Side View



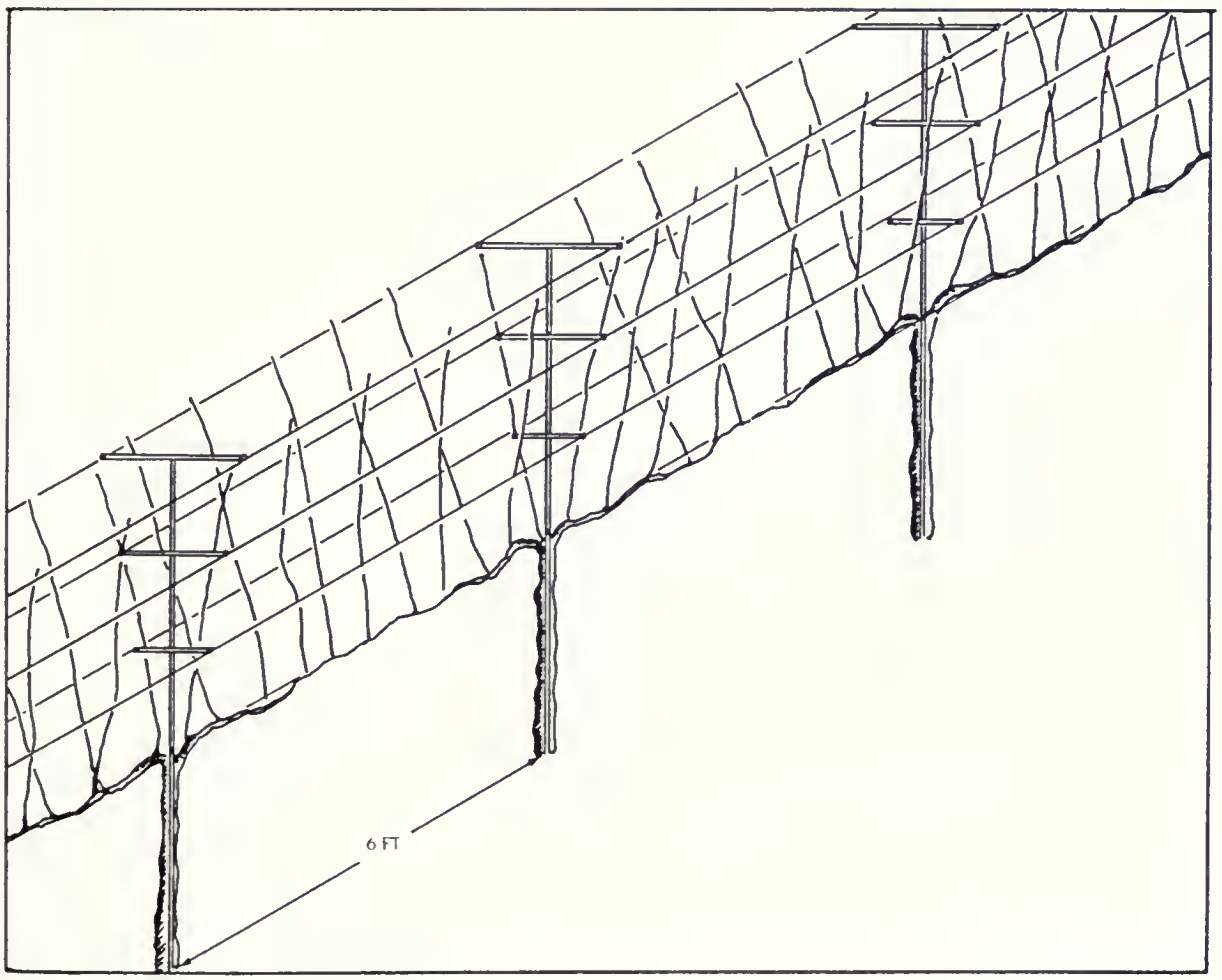
1990

CLOSED V TRELLIS

SIMI WINERY



TRELLIS CROSS-SECTION CROSS-SECTION WITH VINE SIDE VIEW

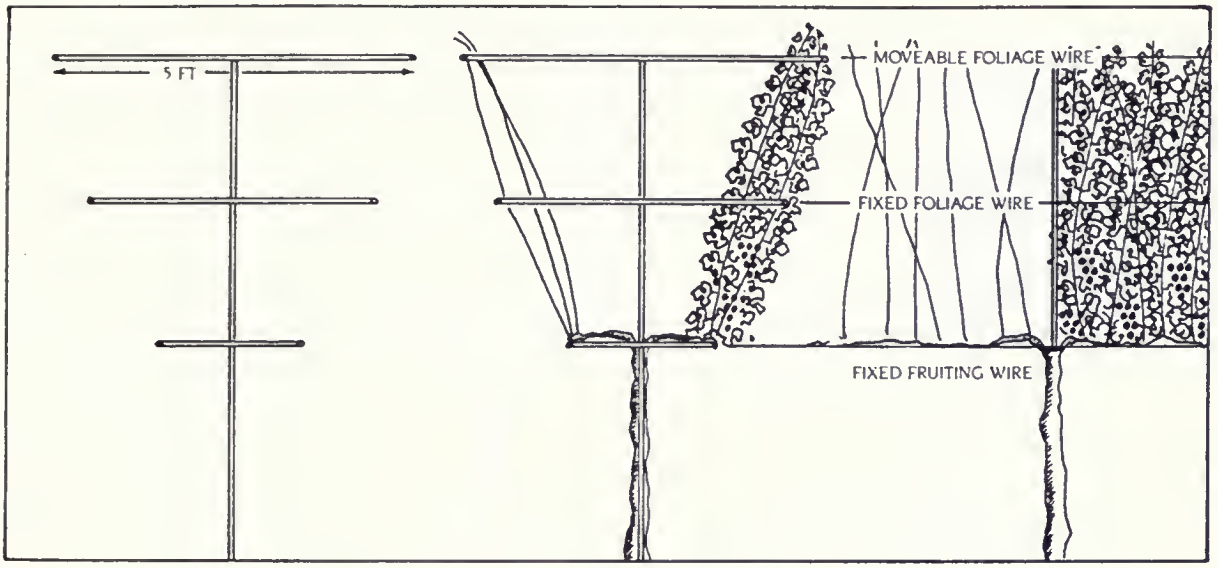


ROW SECTION WITH VINE PLACEMENT

1990

OPEN LYRE TRELLIS

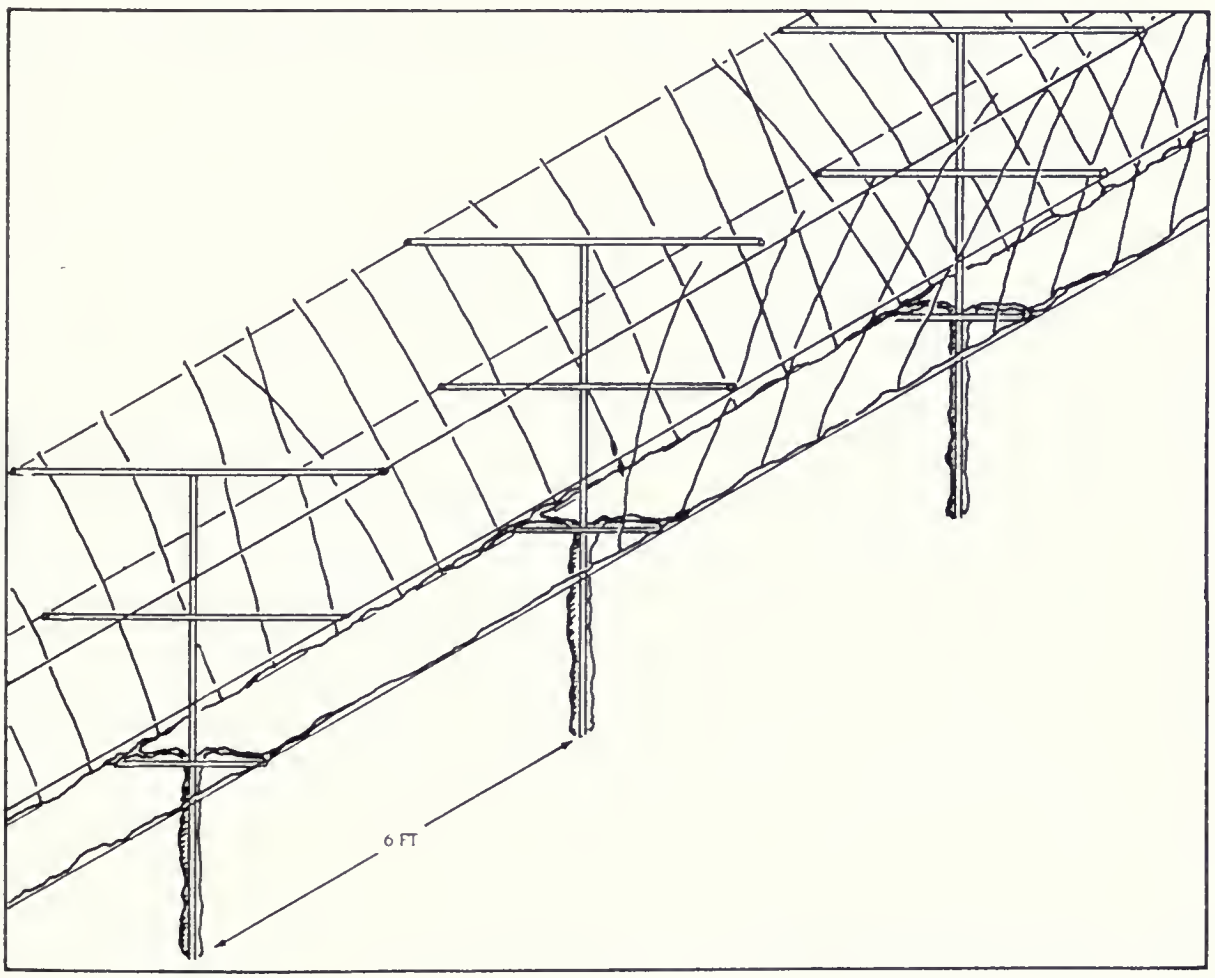
SIMI WINERY



TRELLIS CROSS-SECTION

CROSS-SECTION WITH VINE

SIDE VIEW

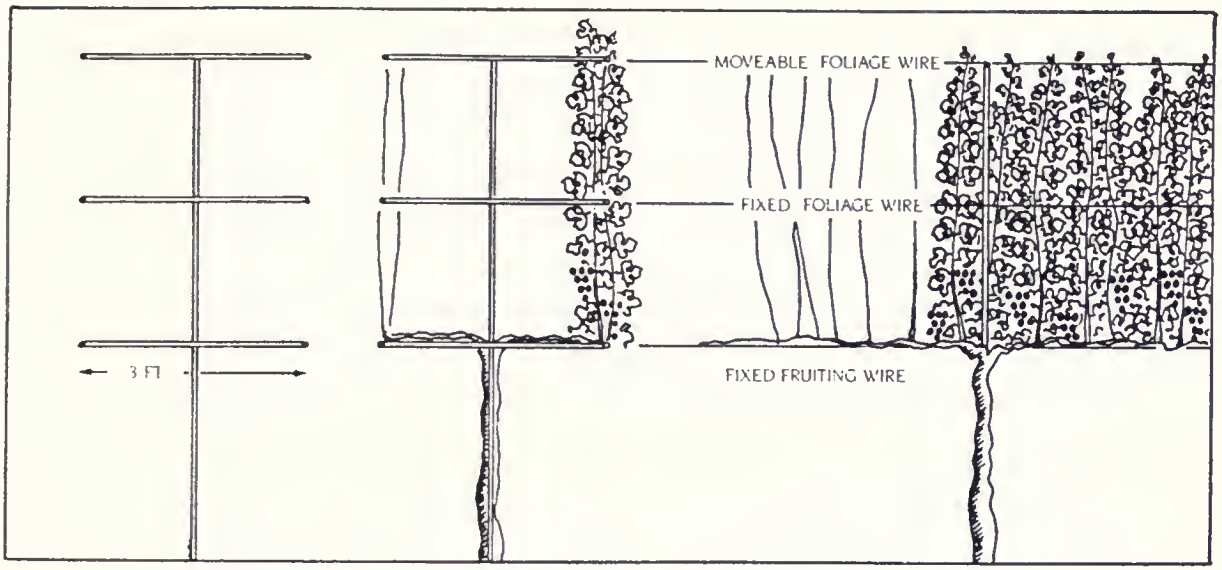


ROW SECTION WITH VINE PLACEMENT

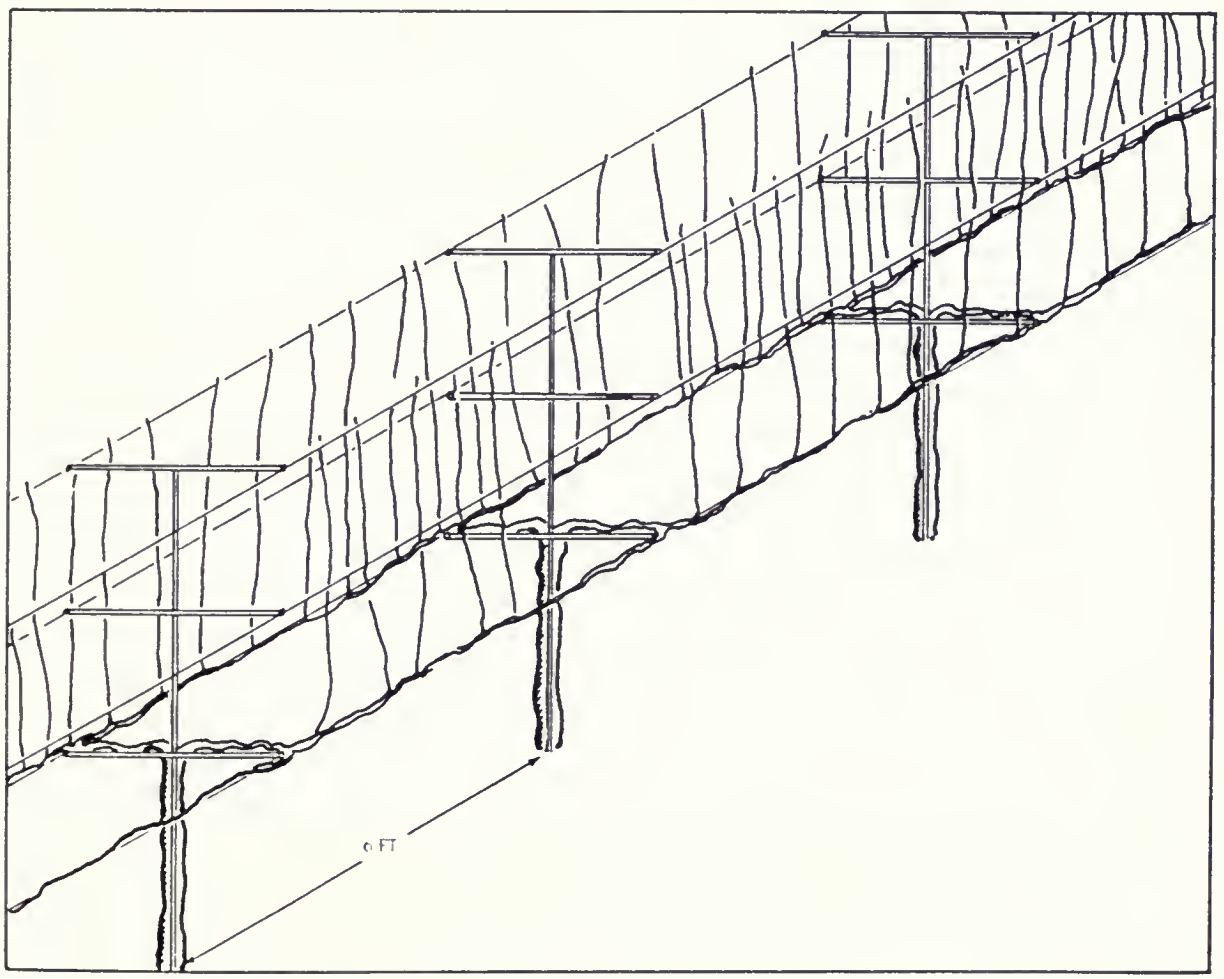
1990

OPEN U TRELLIS

SIMI WINERY



TRELLIS CROSS-SECTION CROSS-SECTION WITH VINE SIDE VIEW



ROW SECTION WITH VINE PLACEMENT

The other thing that was interesting in that time period, and I think it tied in somewhat to the tenor of the times and this research group, was that at UC Davis for the first time the research work done by the viticulturalists and the enologists began to be tied together. At UC Davis there is a Department of Enology and Viticulture, and their professors, for the most part, had done separate work, with the viticulturalists seeing the end product as grapes and the enologists seeing the end product as wine. Partly because of our research group and our emphasis on the wine being the end product, in the 1980s there began to be joint work, which, if you think about it, was incredible that it hadn't happened before.

I have to say that the viticultural changes in the 1980s were revolutionary for our industry and have provided a completely new base for development in the nineties. People may think we've come a long way, but I can see that we just built a base in the eighties that will allow us to do many more things in the nineties.

Hicke: That's one of the reasons we're here doing this, to document all of that. I do think it was important that when you moved into the management of the entire business you had this idea of working together.

Long: It was important. The steps we took at that time were new steps, but we've gone a step beyond that and created essentially a wine-growing team, which is a structure that further brings together in an even higher-level, interactive mode, our winemaker; our laboratory director; our viticulturalist; our cellarmaster; Michael Black, our vice president of vineyards; and his assistant, Keith Horn--talking about what we're trying to accomplish, what the end goals are.

For example, we have a consultant from Bordeaux named Michel Rolland. He has grown up in Bordeaux and has a large consulting practice located primarily in Pomerol and St. Émilon. He was here last week, looking at the vineyards. The focus of his visit was the condition and particular nature of the Cabernet this vintage, for 1991, and what impact that might have on harvest decisions and winemaking decisions. When he was out in the vineyard, looking at the grapes, Michael Black was there, Diane Kenworthy was there, our vineyard manager and viticulturalist; Keith Horn, assistant vineyard manager; Nick Goldschmidt, our winemaker; Monika

Christman, our lab director. All of these people who will be part of that ultimate growing of the wine were together, discussing what's going on in this vineyard and what that is going to mean to the winemaking.

When we work with Michel, we start with the wines. He's worked with our wines for about five years, so he knows this is the wine we make from this piece of land; so let's go look at this piece of land and think about the timing of the harvest and the management of that land. When we bring in consultants we're always doing the same thing: these are the wines that we are making from this piece of land; let's talk about the management of that piece of land toward the end goal of this kind of wine. I think about it as a circle. The circle begins with the tasting of the previous vintage by the vineyard and winery people and an assessment of the wines from each plot of ground--what are their strengths, what are their weaknesses. When the vineyard cycle starts--pruning, the leafing out, the bloom--what is it in each step of the cycle that is going to address the questions or the issues we have with any particular piece of ground? How are we going to change our viticulture techniques for that piece of ground?

Then harvest approaches, and we're tasting the fruit. We're thinking, "What are the characteristics of this particular site in this vintage, and therefore how are we going to respond in our winemaking?" After harvest we taste the wines again, and we say, "How did we do? Last year at this time this site had these strengths and these weaknesses and these questions to address; how effective were we in the vineyard and the winery and in the two coming together in addressing those issues, answering the questions, strengthening the wine?"

Hicke: How many pieces of ground are we talking about?

Long: Thirty-six. [laughter] Then the question starts over again: what about for next year? So it's this circle of interaction that just keeps moving for the goal of quality improvements for the wines from that vineyard.

Hicke: And this is just Cabernet that we're talking about?

Long: This is just Cabernet. But this is a good model for what I would call sophisticated winegrowing in the 1990s, and it's what it will take to make outstanding wines in the 1990s.

Hicke: This is probably impossible to say, but how many different wines do you think you make in experimenting with all these questions?

Long: We could count, but I would guess four hundred every year.

Hicke: Again, it looks very complicated. I think the important thing is that this is where you're going with it.

Long: I think perhaps you can recognize from what I've said that intrinsic in that is continuity. As far as continuity with a vineyard site, we work with it two or three or five years. The more we work with it, the more we understand it, the better job we'll do, whether we're buying the grapes or growing the grapes. Continuity with the people is important, because they build up their understanding of the process and of the vineyards. Ours is a business that does not benefit from constant turnover. It's a business that in a sense is contrary to our current culture, which is quick change and quick decisions. That's really not what fine winemaking is all about. It's about long-term thinking and long-term development.

Hicke: That's another management challenge, dealing with people to assure continuity, and with the growers.

Long: It is, there's no question about it.

Hicke: Do you find that more challenging or as interesting as just dealing with wines as an enologist?

Long: When you look at the managing of the business, it's not that different conceptually. You have different parts of the business--you have sales, your vineyards, your winemaking, your finance administration--and they're all parts that have to be pulled together to grow a fine business, as we pull together different parts of the winemaking process, the equipment, and the grapes to make a fine wine. In the winemaking process, the central character is the wine, in essence. You're trying to build a system, a model, a way of looking at things and responding that will create the kind of wine you want. With a business, the central character is the people. You're trying to build a group of people who will bring the talents and the commitment to allow the business to be what you want it to be.

Conceptually it's not that different. As with winemaking, which is complicated (as you've mentioned), it's providing that kind of an atmosphere where they have a chance to be creative, to make a difference, to be respected, to be heard, to be committed. That's what everyone is always trying to do, and it's much easier said than done. It's part of the new challenge for me, absolutely.

Hicke: And probably equally frustrating at times.

Long: Yes. [laughs]

Hicke: There are several things I want to mention here. Maybe you've alluded to this; I know you have an image not only of what your wine should be but of what the business should be--what Simi should be. All of the new buildings and everything fit that image. Could you elaborate on that a little bit?

Long: I'll describe the image, and I can say with accuracy that this is the image that I inherited from Michael Dixon; this is the model he worked on. It's an image that was supported and encouraged by Moët-Hennessy [owner of Simi], and I think it's an image or a vision that's shared by the people here. Simi is essentially a wine business--not a big business but a small business--producing an extraordinary level of quality, with the ability to do that consistently and to continue to improve and evolve both the quality and the style. There are not that many wineries that have actually been able to do that successfully over time.

Some of our most wonderful memories are of winemakers who come into our tasting room unannounced and taste through the wines and then say, "Every one of your wines is excellent." That's not that easy to accomplish. Recently I did a tasting with Brian Croser, an Australian winemaker, and we tasted 1980 through 1990 Chardonnay Reserve with the winemaking staff. Those wines were outstanding. They were all still wonderful. They were different; some were stronger, some had evolved in a more exciting way. But they were all still wonderful wines. It was just very special to stop and look back on those wines.

So that's the core and motivating force for the people here--to do something, to be involved in something that is really high quality, whether it's the business itself or the wine itself. From a business point of view, because we're a small business, that quality and the reputation for quality is

really crucial for us to be profitable, because we're not turning out millions of cases of wine.

Developing an International Business

Hicke: That brings me to my next question, which is how this more international marketing goal developed.

Long: First of all, Michael Dixon, our former chairman, is British, so he has international roots. Of course, our ownership is French, so the winery was very internationally rooted. You have to say that the wine business is international; wines are produced all over the world. I don't know exactly what date, but I would guess around the mid-eighties, Michael started to develop our export business.

When I was getting ready to transition into the presidency in 1988, I was sent to Stanford for a program called the Stanford Executive Program. It was a two-month program for 180 executives, half of whom were from outside the United States. That was key for me in not only hearing about but feeling the international energy and economic activity in the sense of the linkage of the world in an economic sense. I came back convinced that our export program was crucial to Simi for the long term.

I think at that time Moët, our mother company, had some questions about that. They really said, "Your primary focus should be in the United States," but their vision has changed, too, so they see Simi as a winery that needs to be developing its international market in business.

Hicke: Your persuasion?

Long: I think Michael and I felt the same and equally strongly, and we basically just kept going in that direction. I can't say what changed at Moët, but it's natural of Moët, who themselves have been extraordinarily successful because of international sales, to see it that way. Perhaps it was just giving them a little bit of time to work it through in their own minds.

Hicke: We haven't talked at all about the relationship of Moët and when they took over Schieffelin [& Co] or when Schieffelin bought out--

Long: Schieffelin bought Simi in 1976, before I came. Michael Dixon had purchased Simi for Scottish & Newcastle [Vintners], I think in '74, and then he sold Simi to Schieffelin--not Schieffelin & Somerset--in 1976 and stayed on as the business manager and president.

V CHANGES AND CONCERNS OF THE WINE INDUSTRY

[Interview 2: January 2, 1992]##

Linkage Between Viticulture and Winemaking

Hicke: Let's start with some of the notes you made as you were reviewing the first part of the transcript. I think the first thing you wanted to talk about was the linkage between the vineyard and the winemaking.

Long: When I came into the industry in 1970, the roles of the vineyard and the winery were very different from the way they are today. I want to go back and review the evolution, because I think it's significant for our California history. In 1970, the vineyard was farmed primarily by an owner or a manager of that vineyard; wineries had a much lower percentage of ownership in the grapes that they crushed than they do now. The end product of the vineyard was seen to be the grapes. The grapes were delivered to the winery, and the winemaker would would begin to develop an understanding of those grapes only when they showed up on the doorstep at harvest. Then it was the winemaker's responsibility to make them into wine.

The most interesting thing about that structure was that it reflected the University. The University of California at Davis's Department of Enology and Viticulture, in its very name, would imply the integration of those two disciplines, but in fact at that time they were quite separate. They were physically in the same department, and of course they interacted with each other, but the research was quite separate. There were not research projects that were done jointly between enologists and viticulturalists. Most of the

time the evaluation of the viticultural work was in terms of either tonnage (yield) or vine health, or the Brix, acid, and pH of the grapes. There was very little translation of the viticultural experimental work into the sensory aspects of wine. Then there were the winemaking experiments, and they were evaluated by a very rigorous sensory evaluation system.

These separate roles, in industry and university, continued through the seventies. As I've mentioned earlier, in the seventies the winery would pay for grapes on the basis of Brix. Brix was the implied desired end product of grape growing.

In the eighties, the attitude on the part of the winery toward the vineyard began to change. Over that ten-year period, winemakers were more active in the vineyard; they were seeking to understand the viticulture and the implications of viticulture on wine composition and quality. In the early eighties, Dr. Richard Smart came from Australia, for example, and said that the way that you manipulate the canopy or leaves over the Cabernet fruit while it's ripening has a major impact on tannin quality, perception of texture, color, and on flavor development. In essence, he was saying that if you change canopy in the vineyard, you're going to change your wine composition and quality. That was a very powerful linkage, and I think it was the trigger for the development in the eighties of our North Coast Viticultural Research Group, which was a group that began to see the end product of viticultural efforts as the wine, not the grapes.

In the eighties these changes were also reflected at the University; the enologists and viticulturalists began to collaborate more on projects. The viticulturalists began to make and evaluate wine as an outcome of the different experiments, and they began to struggle with the concept, "How do I quantify the results of the viticultural effort in terms of wine?" That's not a simple thing to do. Let me just give you an example. You're a winemaker; you're reading a piece of technical literature about some work a viticulturalist did in canopy management. He's trying to communicate to you that it made a great difference in the wine, but how can you quantify that?

The challenge is that it is still difficult to scientifically quantify the <u>taste</u> of wine. Dr. Ann Noble, whose area of research at UC Davis is sensory evaluation, has worked out a system that can begin to describe the

personality--i.e., flavors, and aromas--of wines differently in a quantifiable way. She has begun to really address this problem.

In California, we have come an enormous distance in the linkage of the vineyard and the winery. What remains to be done, not only in California but around the world, is to find a way to quantifiably communicate the results of scientific and viticultural efforts in the wine. The way our Research Group quantifies results is by tasting the wines. We financially support the viticulturalists' research and say, "We're interested in the wine as the end product of your work." How do we evaluate the work? We taste it. But of course if you are a scientist, you can't rely on people around the world tasting the wines you've made; you have to find a way to quantify them and to effectively, scientifically, communicate results.

Hicke: Are you talking about the wheel that she developed?

Long: Dr. Noble developed an aroma wheel, but she has also developed what I call a "spider diagram," which is a way of identifying not only the particular aroma components a wine has, but the amount of each of those components--and then displaying it visually. So you can begin to try to envision the different personalities of the wine.

Hicke: Do you have to do this on a computer?

Long: Yes. The computer is used extensively in her work.

What I'm describing is a scientific technique. It's not something I see being used in a winery, because we quantify the efforts of our own vineyard-viticultural work by tasting the wine. But in the larger picture, it is important that the world of science find a way to communicate more effectively about wine aromas, flavor, balance, and personality.

In the decade of the nineties, I see a continuation in this movement of the linkage of the vineyard and the winery. One example of better linkage is the developing role of the viticulturalist, who is the technical person in the vineyard who sees wine as the end product. Here at Simi we're putting a tremendous amount of emphasis and energy on the ability of the whole winemaking team to understand what's happening in the vineyard and to be able to give effective feedback to the vineyard managers about the nature of the wines, their

strengths and weaknesses, so that the vineyard people have an essential grasp of the wines. For example, if I say to our winemaking and wine growing team, "We need to improve the quality of the Cabernet Franc from our vineyard," it's essential that everyone have a common understanding of what that wine is like--what its strengths and weaknesses are--so each individual can envision how to support growth and development of that wine in their area of expertise. Improvement might come from a change in pruning, the watering process, the timing of harvest; from analyzing some of the components of the wine in order to get a better understanding; or from the vinification. But that wine won't reach its ultimate quality level until all of the thinking of the vineyard and the winery is integrated toward the particular goal of quality, composition, flavor, and structure. Everybody must have a common understanding.

Hicke: How do you actually do this? Do you have daily or weekly meetings when the winemakers go out to the vineyards?

Long: We're developing two teams--a winemaking and a winegrowing team. The winemaking team members are our cellarmaster, laboratory director, winemaker, assistant winemaker, and viticulturalist. Two of those, the winemaker and the viticulturalist, are also on the winegrowing team, with our vineyard manager and his assistant. These teams develop specific goals, based on our winery quality orientation, and work together to achieve them.

It is important to bring the vineyard people into the winery and have them taste the wines and observe the winemaking process, so they begin to have (for example) their own intimate sense that: "These are our grapes from this hillside 'Block 10,' and the wine tastes of deep berry flavors, good tannin, delicious." They're not waving goodbye to the grapes as they go into the gondola and go out to the winery; they're maintaining their continuity of relationship and seeing those grapes transformed into wine. They're beginning to think of that plot of land in terms of the wine and not the grapes.

The most important change is changing people's thinking. That's the first thing you have to do. When the people in the vineyard look at a piece of land, they have to see in their mind's eye and taste the wine from that land. The people in the winery, when they look at a wine, have to see the soil and the vines that it came from. Until those people can have

those visions, you won't get a complete linkage, and you won't make the best wine from that piece of land.

Hicke: It's also absolutely necessary that the winery own the vineyard, then, isn't it?

Long: Your ability to achieve complete linkage is increased a hundredfold if you own the land. We found, though, that we can enhance our ability to work with a grower by working with their piece of land for a long time. Most of our Chardonnay growers, for example, have been working with us for ten years. We have been in those vineyards many times and know the owner-managers, and in most cases we have established a close relationship with them. We know their vineyards; we can close our eyes and see the land, the grapes, over many years. That enhances our ability to do a better job. We want also to develop the linkage the other way, so for each vineyard that we buy grapes from, we taste that wine with the owner-manager and talk about it--taste it in a context of the other wines of that variety that we make. It's not as powerful a linkage our own vineyard, but it's still a good linkage, with potential for more development.

The Concept of *Terroir*

Hicke: Does this bring us to the concept of *terroir*?

Long: *Terroir* is a French word, and it has often been misunderstood to mean "soil." The French talk a lot about how crucial *terroir* is to their wines; how *terroir* creates the wine's personality. *Terroir* really means "vine environment." It is everything--soil, climate--that the wine sees and experiences. I'm sure you're familiar with this feeling in very traditional winegrowing areas that there are distinctive personality differences in wines from one plot of land to another. Why would that be? The more I've thought about *terroir*, the more impressed I've been with the degree of difference that is possible from one site to another.

First, consider the soil. For example, in Sonoma County there are sixty different kinds of bedrock which generate soil. That's enormous diversity. But if you go onto a site and dig down with a backhoe, the soil is never one layer. It

can be two, three, or five layers, and they can each be a different depth. From the perspective of the vine's root, the number of layers it hits, their depth, composition, and water-holding capacity are going to make a major difference to the vine. There are not only the big differences in soils, there are the differences just in terms of the layers, the depth, the water-holding capacity, the ability to drain, and the nutritional value in each of those layers.

I have seen soils in other parts of the world that are very uniform from top to bottom, and they don't provide a great deal of variety for the vines. Sometimes you see soil with two layers; or you have what we call a clay pan, a hard layer that the vine roots can't penetrate. Underneath the soil, in ways you can't see, is an enormous diversity of conditions that impact what the vine roots are going to be doing.

Above the ground you have the conditions of sun: how many days of sunlight will the vine experience in a growing season--in the ripening season. How long are the days? What's the angle of the sun? What is the heat, both during the day and during the night? Heat during the night is really important, because the vine has a significantly different metabolic response to cool nights than warm nights. So sunlight, temperature, and moisture--if you read a graph you could see so many inches of water a year. But does that come in three major rainstorms? Does it come in the form of mist, ten days out of thirty? For example, Willamette Valley in Oregon and Sonoma County have a very similar total rainfall, but the weather patterns for that rainfall are totally different. We get all of our rain in the winter and spring, and they get it throughout the year, more frequently, with less hard rains, more gentle rain and mist. We get it a few times in hard rainfall. Those variations make major differences to the growing conditions of the plant. Their plants in the summer have water naturally, and ours don't, so we have to irrigate. They have more cloudy days. The amount and timing of water is important.

Wind is another factor. Wind can remove the water from the vine and from the soil, and it can cause the vine to close down its respiration. If you're in a windy site, the vine is going to have less ripening time than it would in the same site with all the same conditions except no wind. Also, there's what we call exposure--the direction that the vines are facing. On a hillside, if they are facing north, south,

east, or west, it will dramatically impact the heat units they experience and the timing of those heat units.

So suddenly you start thinking, "Nothing about sites is the same; everything is different." And it's true. It's amazing. One of the things I love about wine in today's era, when everyone is sensitive to the environment--wine is something that is very responsive to environment. All of our food supply is responsive to environment, but we don't appreciate that as much, because agricultural produce is very transitory. But wine isn't, so these environmental differences that affect the grapes are translated into wine, and you can read them. Wine is very special in that regard. It freezes in time, the environment of the moment and the human effort of the moment.

Hicke: You can't keep a tomato from one year to the next.

Long: No, and you can't taste the difference twenty years later. And you can't line up twenty-five tomatoes from around the world or from different parts of California and taste them, but you can do that with wine.

So this is the concept of *terroir*, which is integrated into the idea of the linkage of the vineyard and the winery. The more we really understand the growing conditions for our vines, the better job we can do in viticulture, responding to those growing conditions, and in the winery, responding to the particular characteristics of that site. That's been a big transition. When I was in Davis in 1970, it was felt that climate--weather--was the most important influence on the vine, and soil was very much played down. In Europe, there is a reverent feeling toward the soil and the impact it has. But it is everything together; you have to understand that it's the whole environment of the vine, the whole ecosystem, that is affecting the wine.

Hicke: Then everything like irrigation, canopy management, trellising, and so forth, is part of the management of the *terroir*?

Long: That's right. There are appropriate responses to a particular *terroir*--a particular vine environment. It wasn't that long ago--ten or twelve years ago--when we were treating all vineyards as if they were the same--the pattern of planting and selection of rootstock. There was no thought to clones; there was little thought to row direction, except to the

contour of the land. Spacing was the same and trellising very similar. So it was only a short time ago that we were relatively unresponsive to that idea of the environment and *terroir*.

Hicke: That's a huge step forward, I would think.

Long: One of the actions we've taken in our Simi vineyard, in a pragmatic way, to deal with the understanding of the soils, is to go through each of our different sub-plots of land, which are usually two or three acres, with a backhoe, dig down four or five feet, and look at the nature of the soil. When the vineyard manager is irrigating, for example, he has in mind what kind of soil is down there for the roots. Is the water going to be retained or not? He knows now that some areas have to have more water because they're so well drained, and in some cases we found clay pan, so he has had to go in and break it up. It helps him understand why some areas were very weak in growth and some very strong. So that was a very practical response to the idea of understanding *terroir* and using that information in vineyard management.

The American Appellation System

Hicke: Which of your topics shall we discuss next?

Long: Why don't we talk about the American appellation system and how that ties into *terroir*. Then perhaps we can talk about phylloxera; we'd still be in the vineyard area.

I believe it was in 1978 when the BATF [Bureau of Alcohol, Tobacco, and Firearms] implemented a system for defining geographical areas of grape growing. We are required legally to put the origin of the grapes on the bottle. Up to that time the origin had been in terms of a state or a county. Although people used Napa Valley, there wasn't really any regulation as to what Napa Valley was. Of course, the county lines were fairly clear. The BATF decided to develop a nonpolitical appellation; a political appellation is one whose lines are defined by county or state boundaries.

The viticultural appellation was defined by geography and historical use. To apply for a viticultural appellation,

a group of people had to get together and say, "We believe we have a viticultural appellation, and we'd like to formalize it." They had to show that the name they were proposing had historical use, as the Napa Valley did, as Alexander Valley did. And they had to show that there were geographical, geological, climate boundaries to that appellation. This is very congruent with the European appellation system that defines specific viticultural areas in terms of their geography.

I don't know the exact number, but there are over a hundred viticultural appellations in the United States, and the number is continuing to grow. At the same time, I believe that currently appellations are primarily locators for people. In other words, in the traditional European system, an appellation of, for example, Pauillac in the Médoc in Bordeaux, is meant to mean, "This is a particular piece of ground that will produce wines that are uniquely distinctive within this area."

But our geographical boundaries for viticultural areas encompass a tremendous diversity within the area. So within Alexander Valley, Napa Valley, Willamette Valley in Oregon, Columbia Valley in Washington, there is enormous *terroir* diversity. Our appellation system is still primarily a communication device for the location and the geography of the area rather than an appellation with a consistent *terroir*, producing a wine of consistent personality.

To go back to the European reference, within their appellations they are only allowed to grow only certain specific varieties. We haven't allowed such a restriction, and I don't believe it makes sense to do so. I mentioned earlier Dr. Deborah Elliott-Fisk, who is a geography professor at UC Davis. One of the very interesting things she has told me is that in Sonoma County there are sixty different kinds of bedrock, and that in the whole of Bordeaux there may be four to six kinds of bedrock. One of the reasons we have so much geological diversity is because of our location at the intersection of the Continental Plate and the Pacific Plate. Over eons of time there has been volcanic activity, upheaval, uplift, and fragmenting of soils. In the whole coastal area of California--Central Coast, Napa, and Sonoma--we have such a diversity of *terroirs* that I'm not sure we'll ever be able to form viticultural appellations that have a unique *terroir* unless they're very, very tiny.

It does, however, explain our ability to grow a large number of wine varieties successfully. Again going back to the traditional model in Europe, there are Chardonnay and Pinot noir in Burgundy, Cabernet and Sauvignan blanc in Bordeaux. Europeans come to Sonoma County and wonder how we can grow all of these different grape varieties. But when you think about the enormous geological and climate diversity--at the coast it's often foggy, and so cold you can hardly ripen a grape, and if you go sixty or eighty miles inland, it's very warm, and you think of all the interplay between the coolness and the warmness in that sixty miles and how that's affected by the site, the soil, and the exposure, you can conceptualize a thousand different possibilities for growing grapes.

Hicke: So what is the value in the appellation?

Long: I think that's a good question. Our industry has tended to some extent to look to Europe as a model, and even our wine consumers do. They see the appellations in Europe as the model for saying, "This is the best site for Chardonnay and Cabernet." To the extent that anyone has that same expectation of our appellations, it is an inappropriate expectation. The function, therefore, is more as a locator: this is where Alexander Valley is, these are the boundaries, and now you know where the vineyards are. All it really says about the vineyards is that that is where they are.

Hicke: It doesn't really say anything about the wine?

Long: Except in a more general way. A general comment you could make, for example, about Russian River Valley versus Napa Valley, is that if you know the location, you know that Russian River Valley is closer to the coast and therefore likely to have more ocean influence. You can make general comments, but you're not going to be able to say, "Oh, yes, the Chardonnay growing in this appellation is always this way."

Hicke: Very interesting.

Evolution of the Use of Wine Varieties

Long: Why don't I talk about varieties? I thought it would be worth tracing the history of the use of wine varieties in the period of time that I've been in the industry. When I came into the industry in 1970, at Robert Mondavi there was tremendous focus on crushing the new fine varieties--Pinot noir, Cabernet, Chardonnay, Sauvignon blanc--and there was relatively little of them planted.

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Long: I remember that oftentimes we would have a grower who would bring in Chardonnay, and then we would get their Mondeuse, Mataró, and Sylvaner in addition. To get the varieties we wanted, we had to take a varieties which at that time we considered not very interesting. As a result, ultimately old vineyards were pulled down, and many of these old, "uninteresting" varieties were removed. I just recently had a discussion with Lou Preston of Preston Vineyard in Dry Creek, and he said that when he bought his property in the Dry Creek Valley, he pulled out his old vineyards. Now he wishes he hadn't.

That's the interesting thing about the way the varieties have evolved. We started in the early seventies with old varieties and old vineyards and very few Chardonnays, Cabernets, and Sauvignon blancs. In the seventies there was an enormous wave of planting, and many of those old vines were removed. People made many different kinds of wine. Yes, there were Chardonnay and Cabernet, but there were also Sylvaner, Riesling, Petite Sirah, Zinfandel, Gewürztraminer--quite a variety of wines produced in that decade.

By the eighties we saw a significant consolidation of varieties. In California it was estimated that many, probably the majority, of wineries were producing Chardonnay, and there were many of them producing two or three different Chardonnays. So with 770 wineries, people estimated as many as 1,000 to 1,200 Chardonnays being made. That same phenomenon occurred to a lesser extent with Cabernet. We had a strong varietal focus, not only in terms of making the varietals but in terms of growing them; the number of varietals was reduced. If you wanted to buy a California Gewürztraminer, you would have had a much more difficult time finding it.

By the end of the eighties, there was a reversal of that trend, and there was a renaissance of some of the older varieties. The wine that I knew in California as Mataró, in France is more correctly known as Mourvèdre, which is a fine red grape component of the Rhone wines. People began planting these new varieties, and the focus was on the red and white varieties of the Rhone. An interest is beginning to develop in planting some Italian varieties--Nebbiolo, Sangiovese, Refosco--and I think probably a potential for developing some Spanish varieties. You can see that the eighties were the turning point; we saw consolidation and then a reinvigoration of interest in old varieties. I think that's a very healthy direction, because we have a solid, classic base now in Chardonnay, Cabernet, Sauvignon Blanc, Merlot, and to a lesser extent Pinot Noir and Zinfandel. There is also opportunity to develop new interest in wines--in blended wines out of these varieties.

Hicke: Like Meritage?

Long: Meritage is a classic blend of Cabernet, Cabernet Franc, Petit Verdot, Merlot, or Malbec. Those varieties have been with us through much of the eighties, but I would view the varietals of the Rhone, Italy, and to a lesser extent Spain as the new direction.

Hicke: Is this just because winemakers or customers, or both, got bored with what they were growing?

Long: I think there has been a certain sense of being overwhelmed with a flood of Cabernet and Chardonnay, and not everyone can excel with these wines. Many times a small winery will seek a particular niche where they can excel. Take Navarro, in Anderson Valley, as an example; they make great Gewürztraminer. Navarro is not a big winery, and there's not a huge demand for Gewürztraminer; but there is a demand for a small amount of fine Gewürztraminer, and they've found that niche and have developed it.

Hicke: Is it dry?

Long: I believe they make both sweet and dry Gewürztraminer. That's been a very successful strategy for them, and it has offered the consumer a wonderful alternative wine to choose from. I think it's a very healthy development for the business.

Hicke: I guess Randall Grahm was probably way out in front--

Long: Randall was certainly the leader with regard to the Rhone wine development.

Phylloxera

Long: Let's talk about what has happened to date with phylloxera. In the early eighties, a small portion of a vineyard in Napa Valley was found to be dying. Upon investigation, it was discovered that the vines were dying of phylloxera. On further investigation, it was discovered that its rootstock was not A x R #1 rootstock. During the planting in the early seventies there were some inadvertent mixups of rootstock. After you plant a vineyard and graft onto it--you can't easily look at a vineyard and know what rootstock it is. If a nurseryman gives you two thousand A x R rootstocks, you really don't know for sure that they are A x R until they leaf out. In our old system of developing vineyards, we would plant a rootstock, allow it to grow, and then graft onto it in the vineyard. So the grafter could at least check the nature of the rootstock.

In the new systems of development, you take a stick of rootstock and a stick of the grape variety, and you graft them together when they are dormant. When you plant the graft, you see only the wine varietal, so it is a little more difficult to monitor the rootstock. But it was known in the planting boom in the seventies that there was some mixing of rootstock in the vineyards. So when they found this vineyard going down to phylloxera and looked at the rootstock and found it wasn't a known resistant rootstock, that was a satisfactory explanation.

It was in 1985--I understand this from reading--that it was first identified that a vine on A x R #1 rootstock was dying of phylloxera. That was hard to accept, because A x R rootstock had been used over the years with great success. It had been selected from a whole panoply of rootstocks in the early part of the century because it produced good wine, was easy to graft, grew well in the vineyard, and so on. In the second half of the eighties there was additional investigation to determine: "Is this true, that A x R #1 is susceptible to phylloxera?" The University believed that to come out and say, "Gee, A x R #1 rootstock is going down to phylloxera"

would create a big problem if not first thoroughly investigated. The University viticulturalists had been the original people recommending A x R, and they were the people investigating this phylloxera problem.

In the second half of the eighties, a different biotype of phylloxera was identified. If two phylloxera bugs were put on the same A x R #1 root, it would resist one of them and not the other one. The new biotype was responsible for the death of the A x R-based vines.

Hicke: You mean it was different from what had hit a hundred years ago or from what had hit in the seventies?

Long: Phylloxera is always present in the vineyard to some extent. It's just that some rootstock have the ability to co-exist with the phylloxera.

Hicke: And now there was this new type appearing?

Long: Now we have a new biotype. The result is that the biotype is devastating the rootstock; it is killing the A x R #1 rootstock. The primary area that was infected was Napa Valley. It's not clear how that happened, because in the second half of the eighties the vineyard owners in the Napa Valley experienced outbreaks--it was almost like measles. Within two or three years, all of a sudden there were infected spots through many of the vineyards in the valley. Many explanations have been suggested: the flood of '86; maybe it was spread that way, but that didn't make sense because hillsides had problems. Maybe there was so much vineyard development that an original infection was carried by equipment. Maybe it was in a nursery unbeknownst, and when plant material was taken from the nursery and planted in vineyards it spread. I don't think anyone will ever know exactly what happened. It just seemed to spring up.

Infected vineyards have experienced about a threefold increase every year. If you have one vine that dies from phylloxera one year, next year you will have three, then nine, then twenty-seven. As we look forward, we think that by 1994 or 1995 there is going to be dramatic removal of vineyards as a result of this geometric progression.

Hicke: Is it coming into your vineyards?

Long: We have it at Simi in a small area. As soon as we heard from our viticultural friends what was going on in Napa, we instituted a program to search for phylloxera and discovered it in a few vines two years ago, and we monitor its progress. It seems, from other people's experience, that the rate of increase in any one site depends on the soil conditions. It seems to spread faster in a heavier clay or moist soil than in the very dry, rocky, or sandy soil. It's hard to project, really, the rate of the vineyards going down on any one site until you have a several years of data.

Sonoma County is about five years--I'm guessing--behind Napa in terms of infection rate. Most people who have thought about this subject believe that in ten years, 85 percent of the vineyards in Napa and Sonoma will be replanted.

Hicke: I've heard people express the thought that a lot of these vines are old and the vineyards would have to be replanted anyway.

Long: I think there are some positive aspects. In the last twelve years, because of all the work I've told you about, we've learned an enormous amount about our vineyards. This gives us an opportunity to replant the vineyards in the sense of what I was saying: here's a site, what are the proper rootstocks, varietals, clones, row spacing, trellising, row orientation? As we pull out all the vineyards in Napa and Sonoma and replant them in a more sophisticated, thoughtful, *terroir*-responsive way, we can enormously improve our quality. And we will, but of course it's a great expense, and it's over a long term. But that is the direction that things will move.

Hicke: Is there another rootstock that's resistent?

Long: We can't go through this discussion without saying that there's an enormous amount of controversy over this. Some of the nature of the controversy is that the University wasn't pro-active enough in talking about this problem earlier; that they took too long to withdraw their recommendation of A x R. Some of the controversy is over whether there really is a biotype. The Europeans are particularly critical of American viticulture, because their experience was that many years ago when they planted A x R rootstock, it declined to phylloxera very quickly.

Hicke: Oh, really? I didn't know that.

Long: They never had the experience that we did of thirty to forty years of effective operations of A x R. Their stance is, "We figured this out a long time ago. Why didn't you?" [laughter] They really have the lifted eyebrow toward the biotype explanation. But frankly, when you stop and think about phylloxera, I suspect that if there were adequate research done--and there hasn't been any--that you would find there are dozens of biotypes. There's no reason to think that phylloxera is exactly the same around the world; there's no other biological system that is that way.

The Leading Role of California in the Worldwide Wine Industry

Long: Another subject I wanted to talk about, which I believe in very strongly, is the leading role that California has taken in the change of winemaking around the world. At the time that I was first in the business in the seventies, I was fortunate to do some traveling. At that time, particularly in Europe, there was a sense of great tradition, a sense that things were done as they always had been done, and that the best way to make wine and grow grapes was known and therefore not under investigation. [laughs] But California became so enormously successful, particularly in varietal development--I look at Chardonnay in a sense as a new variety. It's true that the Chardonnay grape is grown and made into wine as White Burgundy in Burgundy, but our particular style, characteristics, and universal appeal of our California Chardonnay, and the fact that it has been marketed as a varietal, have been enormously powerful. That's a California achievement.

In the seventies California was considered, by the rest of the world, a charming curiosity in terms of the wines that were produced, and our activities and wines were considered to be rustic. But California drive, energy, enthusiasm, and investigation traveled around the world, with Californians constantly setting new sights; revolving our palate; setting higher standards of quality, greater sophistication in winemaking and grape growing. We have created wines in the eighties that were considered to be significantly more sophisticated than those in the seventies and are significant competitors on the world scene.

In the eighties, we saw, around the world, vineyards being planted to Chardonnay. In fact, it happened earlier than that. I was in Eugene, Oregon, in 1976 at the first Cool-Climate Symposium, which pulled together people making wines in cool climates around the world. I was very interested to hear the Canadians say they were planting Chardonnay, and also the Swiss, the Italians, the Australians, and the New Zealanders. By the end of the seventies the rest of the world was paying attention to what we were doing, and they were beginning to emulate our varietal development.

When Californians first went to Burgundy to buy barrels, the Burgundian wineries didn't really know where the wood for the barrels came from; they weren't really aware of the techniques for making the barrels. Because of our questions and our interest, and also our discovery that these things made a difference--type of wood, type of coopering, etc.--French winemakers are not only highly aware of these differences now, but they've studied them in their universities and are applying them to their winemaking. This illustrates Californians leading the way in important winemaking details previously unnoticed.

As a result, we have a world scene that is much more competitive. There are many, many more good wines being made from every country, and I think the average quality level of the wines around the world has gone up significantly. Concurrent with that--I don't know if it's a cause or an effect--is that the consumer around the world is demanding better wines. So level of consumption of the old "jug" wines is continuing to decline, and the demand for these finer wines is continuing to increase.

If you stand back and look at that whole picture of about twenty-two years, there is an enormous change in the world scene in wine--what's grown, what's made, the quality, how it's done, the whole attitude toward it. When I first traveled, you would go into a chateau in Bordeaux, and they wouldn't think about doing anything different from their traditional practices. Now, first of all, the next generation is running the chateau; and, secondly, this young generation did its internship in winemaking either in California or in Australia. They probably have a little side project--a little winery in California or Australia in addition to their chateau. So it's fascinating. There's much more travel of the winemakers. Our winemaker, Nick Goldschmidt, is a good example. He is from New Zealand, learned viticulture there,

studied enology in Australia, came to the United States and worked in California, went to England and worked in the wine trade in England, went to South America and made wine in South America. That's not an atypical winemaker.

Hicke: Do you see any particular people or wineries in California that took the leadership in this evolution?

Long: Certainly, going back to Robert Mondavi--he was the first man there beating the drums about the quality of California wine relative to world wine, and he was never afraid to compare his wine to other people's. I remember some of the tastings. He'd bring out [Domaine de la] Romanée-Conti and put his Pinot Noir up against it, and everybody would giggle. Nonetheless, what a fabulously successful individual, focusing the attention on California and what was happening in California. Supporting him were all the wineries that enthusiastically and energetically sought new and better ways of making wine and shared their information. That sharing of information from a technical point of view gave us enormous power to move the whole industry forward, quickly.

Hicke: That was the California development?

Long: Yes. And that North Coast Viticultural Research Group that I mentioned earlier--Simi, Beringer, Mondavi, Domaine Chandon, Phelps, and Jordon--is just one example of that. Actually, you see that somewhat now in Bordeaux; some of the first growths are banding together and sharing information. But that was a concept totally foreign in many other countries, and we were fortunate to be so willing to work together that way.

Hicke: Do you think California is going to maintain its leadership, or is it now, as you've indicated, such a worldwide industry that they're sharing all over?

Long: I think California, as good as our wines are now, has tremendous potential to grow: quality and style. What we have done well is to have at the forefront of each variety certain wines that say: "This is the wine of the future. This is the Chardonnay of the future, the Cabernet of the future; these are the new varietals of the future." At Simi, our way of thinking about what we're doing is to be on that cutting edge in terms of style and quality with Cabernet, Chardonnay, and Sauvignon Blanc. In many cases those are blended varietals,

Sauvignon Blanc blended with Semillon and Cabernet blended with Cabernet Franc, Merlot, and Petit Verdot. We have an ability to continue to develop. As good as our wines are, they can be better; they can be more sophisticated; they can have more evolution; and, partly because of our climate--our *terroir*--we can successfully develop many other varieties.

In fact, I think we've been somewhat subject to and have tended to accept other people's opinions about our climate that were based on their own experiences.

Hicke: When you say, "we," do you mean at Simi?

Long: We in California have been used to Europeans visiting and saying our climate is too hot, too dry. "You shouldn't irrigate your vineyards, because we don't. Your climate is too hot because it is different from ours." There are a hundred examples: "You're not right because you're not like us." The more I've traveled around the world and looked at climates, the more I've come to believe that we do have a very special place. We have a climate that's warm enough to ripen the grapes but cool at nights for flavor and color development; we have a long growing season, so we don't have the problems with frost that they experience in Washington State, for example, where last year they lost a significant portion of their crop, or in Europe, which last year lost a significant portion of their crop. We don't have rain as frequently during the summer, so we don't have to apply the level of chemicals--fungicides--to protect the grapes. We don't have that rain pressure for mold development as frequently as other countries. We don't have hail; you know, we never think about hail. Argentina and Burgundy lose significant amounts of crop from time to time to hail.

So from a strictly agricultural point of view, to have a crop and not lose it to some nasty weather event every year, to have the kind of weather that really enhances quality, this is one of the best places in the world to grow wines. I think we've tended to accept other people's criticism without standing back and saying, "Hey, wait a minute." Ultimately, the wines tell the tale. In our climate that is "too warm," where we "irrigated when we shouldn't," et cetera, we've been able to produce wines that, tasted blind, are as good or better than most any around the world.

Hicke: That is the final test.

Long: That is, in fact, the final test. [laughter]

Hicke: Are there some other things that we haven't covered?

Long: The only other thing we haven't covered is the role of the winemaker and how that has evolved. Certainly in the seventies the winemaker was seen and conceived as the person who had the full grasp of the winemaking process. In the eighties, the winemaker was the person who had a grasp of the winemaking process but needed to be out in the vineyard. In the nineties, the winemaker is the leader of a small group, a team, that has a full grasp of winemaking and winegrowing.

The level of sophistication that we need to have in our winegrowing and winemaking to achieve these cutting-edge wines, to make the greatest wine from each vineyard site, requires a group of people who have a common goal and understanding of the wine and the vines. In that group is someone who is extraordinarily knowledgeable about viticulture, extraordinarily able to manage the vineyards, extraordinarily knowledgeable about the winemaking process, the cellar work, the quality control, and the wine composition. If you take that group of people, and they share a common goal, then you have much more power to achieve this goal than you would in just one person.

What I'm saying is that the degree of sophistication and understanding to grow and make a number of wines at a very high quality level is such that it's often beyond the scope of one person to do.

SIMI

Cabernet Sauvignon

ALEXANDER VALLEY

1988

750 ml.

ALC. 13.3%
BY VOL.

SIMI

Chardonnay

MENDOCINO COUNTY 29%
SONOMA COUNTY 58%
NAPA COUNTY 13%

1990

750 ml.

ALC. 13.4%
BY VOL

VI PROFESSIONAL AND COMMUNITY ACTIVITIES

Hicke: I have a few questions left. I'd like to hear a little about your professional and community activities. You've told me a few things. For instance, you received the Masi International Award for 1991.

Long: Masi is an Italian winery that has selected, every other year, someone from around the world who--

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Long: --has made significant contributions in the wine industry. I was honored to receive that award in 1991. In 1989 I received what is called the WAFI award [Wine and Food Achievement Award]. The northern California chapter of the American Institute of Wine and Food (AIWF) conceived a program to recognize and honor people who contributed in the area of wine and food. Some of the people, for example, have developed new sausages or new cheeses. Every year they have one award for a winemaker, and I received their first winemaker award.

Hicke: These are for your work in the industry? Can you tell me what they recognized you for specifically?

Long: When they gave the award, they didn't say, "This is for this particular activity." It was for the duration of my career: "You have created leadership in winemaking and viticulture which has resulted in outstanding wines, and we're honoring you for that achievement."

Hicke: I wanted to ask you about Women for Wine Sense, too, and women in the wine industry. What are the important things to document about that? I think you were a founding member.

Long: I've been on the board of directors of Women for Wine Sense. The organization was founded by Michaela Rodeno of St. Supery and Julie Williams of Frog's Leap. I've been peripherally active in that group. I've written a group of what we call beliefs and concerns that communicate how we feel about wine being incorporated into our lives as women. I led a group of women to put that together so that when we speak publicly, we have a consistent way to communicate how we feel about issues. I have spoken on behalf of the group in several venues, but the concept and leadership of that group is credited to those two women. And there has been a large number of women very active and invested in that organization.

The idea of the organization came from the fact that wine in the public media was receiving such consistent criticism that you began to feel guilty if you ever drank any alcoholic beverages. But we see wine, first, as the result of artistic, creative efforts--an aesthetic experience for people who consume it, something to really enhance life, something that has great historical and religious traditions, and something that has a healthy role in life. Its health impact is well documented by scientific studies; wine consumption scientifically is a positive health factor for men and a neutral health factor for women. It will enhance a man's longevity if it is consumed in moderation.

None of that sense--the feeling of quality, of history, of its healthy role, of the addition to life's quality--was being effectively communicated. Often women were taking the brunt of being "problems" because they were consuming wine during pregnancy and so on. The group was formed to take a more positive personal view of wine and its place in our society.

Hicke: It sounds like it has less to do with women than it has to do with some of the other aspects of the industry. In other words, you're not focusing on equal opportunity for women.

Long: That's right. That group has nothing to do with that. The group was formed to some extent out of frustration that the rest of the industry didn't seem to be able to effectively speak up positively on behalf of wine. Most of the people in the group are owners or active in wineries, and they feel very strongly about wine. They're very proud of what they've done, and I feel the same way.

It's hard for a culture that's never had wine to really communicate what wine is. It's too easy to see it only as an alcoholic beverage. It's really difficult to understand how complex a beverage it is, which is the essence of what we've been talking about--its reflection and responsiveness to environment, the complexities of winemaking well done, the levels of quality that are possible, the personalities that can be expressed through wine, the enormous variety that can be produced around the world, and the cultural history that it's had.

Hicke: You were founder and president of American Vineyard Foundation.

Long: The American Vineyard Foundation was formed to help finance research in enology and viticulture. Like any other business, we need to constantly reinvest back into the development of our business--or, to put it another way, the improved understanding of growing and making wine. The people who primarily do that kind of research in California would be the professors of enology and viticulture at UC Davis and at the California State University at Fresno. The industry has always supported them to a greater or lesser extent, and that foundation was founded to ensure a continuing supply of research funds and a mechanism to raise, receive, and disburse those funds.

Hicke: So it's a fundraising organization?

Long: Yes, and it was started at that time because of the need at that time. Then a marketing order was passed in the state of California that provided the research funds. As that marketing order ceased, the American Vineyard Foundation again came to the forefront to receive and disburse research funds.

Hicke: You were president of Napa Valley Wine Technical Group in '76.

Long: Both Napa and Sonoma counties have technical associations that meet once a month and generally have a speaker talk about a technical subject and also provide a social forum for the members. I was a member of that group starting in the early seventies and subsequently became president. When I first came to Simi I was a member of the Steering Committee for the Sonoma County Wine Technical Group.

Hicke: You were on the board of the American Society for Enology and Viticulture.

Long: Right. It was the American Society for Enology and Viticulture that originally saw a need to form the American Vineyard Foundation. It was as a board member that I took responsibility to start up the American Vineyard Foundation.

I was also on the Industry Advisory Committee for FPMS [Foundation Plant Material Service], which is the foundation nursery for the American wine industry. As a board, we had a number of major projects. One was assuring that the vine material that was in the older vineyards at Davis was saved. One was creating a new position in the Department of Enology and Viticulture for grapevine development. Another, which the committee is still working on, is to develop a more effective system to import and evaluate grapevine material from around the world and then get it out to the industry in the forms of varieties or clones that we can use and experiment with.

Then I was on the National Grape Crop Advisory Council, which is a Department of Agriculture committee that looks at the grape crop with a national perspective, to see what needs to be done to protect and develop that crop.

Hicke: And you were on the School of Agriculture Policy Advisory Committee at Davis.

Long: That was a brief stint for the more general agricultural issues. Now I'm on the Industry Advisory Council for the Department of Enology and Viticulture, which focuses on the development of that department and its interaction with the industry, and it also helps the department with any larger issues that it may have. It provides advice and direction, communication and support, and probably at some juncture, fundraising for a new building.

Hicke: United Winegrowers of Sonoma County?

Long: United Winegrowers would be in shorthand the county political action committee for the wine and grape industry. Its members are both grape growers and wineries, and the focus is to protect agriculture in Sonoma County. I am a director of that organization.

Hicke: Do you have a representative in Sacramento?

Hicke: Do you have a representative in Sacramento?

Long: No. Our focus has been primarily within Sonoma County. We have a part-time executive director who has worked for the House Committee of Agriculture in Washington, D.C. and was raised in an agricultural community. He has both a good agriculture and political background. More than anything, he has developed and maintained good relationships between our wine grape community and the county. If the county is thinking about doing something that might impact our community, they will seek us out for guidance and input. We've been an effective organization, and we have good working relationships with our county officials. The county has real concerns about protecting agriculture, so it's very positive.

Hicke: I think you've talked about the strengths and the challenges that we are facing today. What about taxes and the anti-alcohol movement?

Long: I think the challenges for California are to continue in the direction that we have set. We've taken a leadership position in terms of wine around the world, and our challenge is to maintain that in a world where there is communication and competition. I think we can do that; there's no question in my mind. In the short term, in the first half of the nineties, we have challenges that are economic, primarily as a result of the recession. I think certainly health and alcohol concerns are there in the background, and they have impacted people's drinking habits to some extent. Some of those concerns are appropriate in our society, such as the concerns of drunk driving. General health concerns are appropriate, but a real, honest view of health would incorporate moderate wine consumption. I think maybe the biggest problem is that alcohol has been painted as completely negative, which of course it's not, any more than any food substance is neither wholly positive nor negative.

I feel that those issues will resolve themselves, that a balanced picture will be communicated and is beginning to be seen. I don't think the picture has been balanced in the last five years; it's mostly been anti-alcohol, and that's not a balanced picture. But a recent 60 Minutes TV program discussed "the French paradox"--that French people have a high-fat diet, drink wine, and have a very low incidence of cardiovascular disease. French doctors feel the linkage between wine consumption and low cardiovascular disease is an important causal relationship.

And there are demographic studies that show a real linkage between alcoholism and societal restrictiveness towards alcohol consumption. Demographically, the more restrictive a society is toward alcohol, the more alcoholism they have and a higher rate of death from alcohol-related problems. That kind of information is beginning to come out, so I'm confident that we will restore our balance of perspective.

Phylloxera is an economic problem for the industry, and the state of our financial institutions in the United States is a problem for the industry, because they're in such a weak position. The banks are pulling out their financial support from small businesses, like wineries, and putting it into government paper and secure investments, and that really doesn't help our businesses grow and develop. But, again, I feel confident in time that will change.

I think the big challenges are the next few years, and I think the biggest challenge, in a sense, is not to be so distracted by the economic problems that we don't continue our march in quality wine development, which is what has established us in a leadership position in the world.

Hicke: This has been a wonderful interview. You are so thoughtful and reflective about everything that you are doing and that is going on. It's really a great contribution to the documenting of wine history. Thank you very much.

Transcriber: Judy Smith

Zelma Long, President, Simi Winery, 1991.

Photograph by David Buchholz

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Appendix A

ZELMA R. LONG
President/Chief Executive Officer
Simi Winery
16275 Healdsburg Avenue, P. O. Box 698
Healdsburg, California 95448
707/433-6981

Educational Background:

1988	Stanford Executive Program, Graduate School of Business Stanford University, Stanford, California
1982-1983	Part-time graduate student at Golden Gate University, San Francisco, California, working toward an M.B.A. degree
1968-1970	Graduate program in Enology and Viticulture at the University of California, Davis
1965	Graduated from Oregon State University with a Bachelor of Science Degree, majoring in science and minoring in nutrition

Employment Background:

1990-Present	President and Chief Executive Officer, Simi Winery
1989	President, Simi Winery
1979-1988	Senior Vice President/Winemaker, Member Board of Directors, Simi Winery
1970-1979	Chief Enologist, Robert Mondavi Winery, Napa Valley, California
1967-1968	Professional dietitian and teaching dietitian, Highland Alameda Hospital, Oakland, California
1965	Dietetic Internship, University of California Medical Center, San Francisco, California

Business and Professional Affiliations:

1977-Present	Co-owner and co-winemaker of Long Vineyards, Napa Valley, California
1981-Present	Member, North Coast Viticultural Research Group
1989-Present	Member, Department of Viticulture and Enology Industry Advisory Committee, University of California, Davis
1990-Present	Member, Womens' Forum, Bay Area, California
1990-Present	Director, Women for Wine Sense

ZELMA R. LONG
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1990-Present	Director, United Winegrowers, Sonoma County
1991	Member - Board of Trustees, California Agricultural Foundation, U.C. Davis
1987-1989	Member, School of Agriculture Policy Advisory Committee, University of California, Davis
1987-1989	Member, Foundation Plant Material Science Industry Advisory Committee, University of California, Davis
1987-1989	Member, Vitis Coop Advisory Committee, Advisory Group to the National Plant Germplasm System U.S.D.A.
1985-1990	Member, California Regional Water Quality Control Board, North Coast Region
1983-1984	Board Member, American Vineyard Foundation
1982-1983	Director, American Society of Enology and Viticulture
1981-1982	Founder and President of the American Vineyard Foundation

. Past Director, Sonoma County Wine Technical Group

. Past President, Napa Valley Wine Technical Group

. Past Member, Technical Advisory Committee, California Winegrowers

Publications:

. Co-authored and presented a paper at the 1986 Sixth Australian Wine Industry Technical Conference, "Juice Oxidation in California Chardonnay," Z. Long, B. Lindblom

. Authored and presented a paper at the 1986 Sixth Australian Wine Industry Technical Conference, "Manipulation of Grape Flavor in the Vineyard, California North Coast Region," Z. Long

. Co-authored an article for Wines and Vines, November 1986: "Juice Oxidation Experiments at Simi Winery," Z. Long, B. Lindblom

. Authored two chapters on "The Science of Growing Grapes," and "Enological and Technical Development," University of California/Sotheby Book of California Wine, 1984

. Authored an article for Practical Winery, July/August, 1984: "Monitoring Sugar per Berry"

- Authored and presented a paper for the Bulletin of the Society of Medical Friends of Wine, February, 1983, Vol. 25, "The New Geography of Wine"

- Co-authored and presented a paper at the 1981 American Society for Enology and Viticulture Convention, "A Study of Compositional Differences in Cabernet Sauvignon as a Function of Press Types and Cycles," Z. Long, B. Lindblom, R. Boulton

- Authored a chapter entitled, "White Table Wine Production in California's North Coast Region," Wine Production Technology In The United States, by Maynard A. Amerine, American Chemical Society, 1981

- Authored a chapter entitled, "Chardonnay," Vintners Club: Fourteen Years of Wine Tastings, 1973-1987, edited by Mary-Ellen McNeil-Draper, Vintners' Press

- Authored and presented a paper: "Future of Controlled Appellations: Are They in the Interest of the Consumer?", Masters of Wine Symposium, Cambridge, England, July 1990

Lectures/Panel Discussions:

- Lecture, "Botrytis in Northern California Coastal Vineyards," Focus on Chardonnay Symposium, Burgundy, France, July 1990

- Lecture, "Chardonnay: Two Perspectives from the Opposite Sides of the Pacific," Tokyo, Japan, June 1990

- Lecture, "Use of Barrels in Winemaking," Cape Estate Winegrowers, Capetown, South Africa, January 1990

- Panel member, discussion on "Malolactic Fermentation," Cool Climate Symposium for Viticulture and Enology, Auckland, New Zealand, January 1988

- Panel member, discussion on "Relative Merits of Wine Production in Traditional Areas like Europe compared to 'New World' Countries, such as Australia, America, New Zealand...," Cool Climate Symposium for Viticulture and Enology, Auckland, New Zealand, January 1988

- "Quality Control: Why It Is Important and How To Set Standards," University of California Extension, Davis, April 1987

- "Use of Sulfur Dioxide," Focus on Chardonnay Symposium, Sonoma-Cutrer Vineyards, July 1986

- "Oxidative Handling of White Must and Other Current SO_2 Practices," University of California, Davis, April 1986

- "Vineyard Assessment," University of California Extension, Davis, April 1986
- Co-lecturer, Chardonnay Style Seminar, "Grape Maturity," "Vineyard Selection," "Phenolics Control," New York, November 1985
- Maintaining Creativity in Winemaking," Napa School of Cellaring, July 1985
- "Use of Aroma Assessment and Berry Sugar to Test Harvest Parameters at Simi Winery," Eastern Grape Growers Conference, Rochester, New York, November 1984
- "Testing Benevolent Vineyard Stress and Other Practices to Improve Wine Quality in North Coast Vineyards," Eastern Grape Growers Conference, Rochester, New York, November 1984
- "Production Planning for the Crush," University of California, Davis, November 1984
- "What is Ph? and How to Teach It," Society of Wine Educators Conference, San Luis Obispo, August 1984
- Moderator for Sonoma County Wine Showcase, August 1984
- "Phenolics," Napa Valley School of Cellaring, July 1984
- "North Coast California," The International Symposium on Cool Climate Viticultural and Enology, Eugene, Oregon, June 1984
- "Oxygen in Winemaking - Enemy or Friend?", Simi Winery Seminar, May 1984
- "Grape Maturity," University of California, Davis, April 1984
- Panel member, discussion on "California Regions, Climates, and Grape Varieties," California Wine Experience, San Francisco, October 1983
- "Simi Winery's Approach to Assessing Grape Maturity," Napa Valley Wine Technical Group, June 1983
- "Women in Agriculture/Winemaking," Fifth Annual Women in Agriculture Seminar, University of California, Davis, February 1983
- Panel member, discussion on "Fashion and Future of Food," moderated by Julia Child, Southern California Culinary Guild, Santa Barbara, California, January 1983
- "Why the American Vineyard Foundation?", California Wine Festival, Monterey, December 1982

- "Advances in Wine From the Vineyard," Simi Winery Wine Writers Seminar, August 1982
- "Ph and Vineyard Advances," Simi Winery Wine Writers Seminar, August 1981
- "Wine Quality Has Three Aspects," Society of Wine Educators Conference, Santa Rosa Junior College, August 1981
- "Red and White Winemaking and Barrel Aging," Simi Winery Seminar, August 1981
- "How I Went About Designing a Fermentation Cellar," California Society of Professional Engineers, May 1981
- "White Table Wine Production in California's North Coast Region, Wine Industry Technical Seminar, 1981
- Panel member, "Women: Involved from Vine to Glass," Sixth Annual Wine Symposium, Healdsburg Chamber of Commerce, April 1981
- "Estimating Winery Cooperage Needs," Filtration Conference, Monterey, February 1980
- Lecture, "Oxidative Handling of Chardannay, and Advances in Viticulture," Adelaide, Australia

Awards:

1991 MASI Award, International Award for Enology, Viticulture and Wine Marketing, presented by Masi, Verona, Italy

1989 Wine and Food Achievement Award, First Winemaker recipient; Northern California Chapter, American Society of Wine and Food

Professional Wine Judging:

1991, 1980 North West Enological Society

1989-1990 Oregon State Fair

(updated August 23, 1991)
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Appendix B 1984

SIMI
SINCE 1876

HISTORY OF SIMI WINERY

On December 6, 1881, two Italian immigrant brothers, Guiseppe and Pietro Simi, purchased a winery on Front Street near the train depot in Healdsburg, California, for $2,250 in gold coin and named it "Simi Winery." Although Pietro had been making wines at their San Francisco produce business since 1876, this purchase marked the brothers' commitment to winemaking as a separate enterprise.

Pietro continued running the San Francisco business while Guiseppe took responsibility for the winery. Within a year he had increased its capacity to 100,000 gallons, making it the third largest of the Healdsburg-Windsor area's seven wineries.

As the settlement of California increased, the brothers' business flourished and they continued to expand. In 1883 they purchased 126 acres of land north of Healdsburg. A new cellar made of hand-hewn stone was completed there in 1890 with a capacity of 200,000 gallons. Guiseppe named it "Montepulciano Winery" in honor of the wine district in Italy where he was born. This winery is now Simi's aging cellar.

The brothers' holdings grew to include the original Simi Winery in south Healdsburg, the Montepulciano Winery in north Healdsburg surrounded by 126 acres of grapes, a 360 acre tract called "King Ranch" to the north of Montepulciano, and 200 more acres to the south.

Then, in the midst of doubling Montepulciano's capacity to 400,000 gallons, both brothers died—Pietro in July and Guiseppe in August 1904. Although it must have been a staggering blow to the families, the businesses continued. Pietro's family assumed control of the San Francisco store and warehouse, and Guiseppe's teenage daughter Isabelle took charge of the wine and vineyard operations.

Isabelle had been very close to her father, weighing in grapes and going on business trips with him from the age of 12. Although she had the support of her older half-brother Louis and experienced employees, it was nevertheless an amazing undertaking for someone her age. But she met the challenge and managed the business alone until her marriage to Fred Haigh, a Healdsburg bank teller, in 1908. Over the years he came to share in the direction of the Simi business and finally resigned from the bank in 1915.

Then came Prohibition. The United States Congress declared it illegal to manufacture wine after May 1, 1919, or to sell or distribute any alcoholic beverages after June 30, 1919. No one in the thriving wine industry seemed to realize the havoc this amendment would cause. Fred Haigh, like many winery operators, believed such a law would be short-lived. He refused to sell Simi's half million gallons of wine on hand before the deadline, keeping the winery full as Prohibition went into effect. Simi continued to work the vineyards and made small amounts of sacramental wines under strict government control, but the financial consequences of restricted business for the 14 years of Prohibition were the eventual loss of most lands and vineyards through forced sale or foreclosure.

Repeal arrived on December 1933. Much of the first wine produced to satisfy the new demand was very young and of poor quality—but not at Simi. Because Guiseppe's rigid quality standards, maintained by Isabelle, included harvesting grapes at a minimum of 22° Brix and aging the red wines at least five to seven years, and because Fred Haigh had decided not to sell Simi's wine 14 years earlier, Simi had good wines

immediately available. Some were exceptional. Those that had not survived the many years of aging were sold for brandy-making or vinegar.

The original Simi winery in south Healdsburg had ceased production after the 1906 earthquake and all wines were made at Montepulciano. During the reorganization following Repeal, Isabelle decided to label all wines with "Simi" rather than the difficult to pronounce "Montepulciano."

In 1936 she had one of the winery's enormous redwood champagne tanks rolled outside along the road and created a retail tasting room which can still be seen today.

By 1938 Parrot & Company had been named the exclusive distributor of Simi Wines. When the Hotel Del Monte, a famous old Monterey resort, began to experience difficulty getting fine wines from Europe during World War II, they enlisted John Parrot's help in locating a high quality California wine. Their red wines soon carried the Simi name.

While it had never been the family's practice to seek publicity or promote their wines, Parrot managed to convince Isabelle to enter the 1935 wines in the 1941 California State Fair. Simi took Gold Medals, the top award, for its "California Cabernet," "California Zinfandel," and "California Burgundy," and a Silver Medal (2nd place) for its "Pink Champagne." The winery's reputation for quality was established overnight and its wines rapidly appeared on the menus of San Francisco's most fashionable restaurants.

Publicity began to fade when Simi's relationship with Parrot ended in 1948. Fred Haigh became seriously ill. An only child, Vivien, had joined the family business following Prohibition under parental pressure. Now more responsibility fell on her shoulders. Upon Fred's death in 1954, mother and daughter carried on; when Vivien died in 1968, Isabelle, still tenacious in spirit although around 80 years old, continued alone. Finally, in 1970 Russell Green, a former President of Signal Oil Company who had moved to the Alexander Valley and planted vineyards, took note of the winery's neglected and disorganized condition and convinced Isabelle to sell Simi to him.

Isabelle still did not abandon what had been so much a part of her life. Through three subsequent ownership changes she could be found seated on her stool in the tasting room recounting Simi's history to visitors. She died at her home in Healdsburg October 16, 1981.

Russell Green brought Simi into the modern winemaking world. He added the first stainless steel tanks and built a new, larger tasting room and office building. During the reorganization, he discovered old wines, including cases of the famous 1935 Cabernet Sauvignon, forgotten in dark corners of the vast stone winery. He hired consulting enologist Andre Tchelistcheff and in 1972 they took the forward-looking step of appointing Mary Ann Graf as Winemaker. Acknowledged as America's first woman college-trained winemaker, her appointment was a milestone for women in a then male-dominated industry.

Eventually Russell Green grew tired of the heavy demands the winery placed upon him. In August of 1974 he sold Simi to Scottish & Newcastle Vintners, a California-based subsidiary of a Scottish brewing company. Its Chairman, Michael Dixon, had spent two years looking for the right California winery to buy. He had become so involved with Simi that when Scottish & Newcastle decided to divest itself of all foreign investments and sold the winery to Schieffelin & Co., a New York based wine and spirits importer, in May 1976, he agreed to remain as President of Simi.

Under Schieffelin's ownership, a 3-year, $5.5 million expansion and renovation was begun. In August of 1980 a 14,000 square foot fermentation cellar was completed, increasing Simi's capacity to 150,000 cases. Fifty-six temperature-controlled stainless steel tanks ranging in size from 500 to 12,000 gallons filled the new cellar. Four custom-designed 4,500 gallon stainless steel tanks elevated 20 feet above the floor directly over a state-of-the-art bladder press allowed the skins of white grapes to remain in contact with the juice to absorb the grape flavors and aromas concentrated in the skins.

The historic stone cellar was renovated. Its three-foot thick stone walls, ideal for maintaining a cool temperature year-round, were stabilized. Concrete floors and drains were replaced on the lower levels. Wooden floors and support beams were replaced throughout to assure that all four levels within the ancient structure were capable of holding the more than 7,000 60-gallon new French oak barrels purchased over the next few years. A new slant-beam concrete tile roof covered the complex. It was a tremendous effort and no small expense, an indication of Simi's total dedication to excellence.

On January 6, 1981, Möet-Hennessy, France's second largest wine and spirits company, purchased Schieffelin, its U.S. distributor, and thereby acquired Simi. Möet-Hennessy's reputation for high-quality luxury products with strong traditions of fine workmanship, enhanced Simi's stature and made its future even more promising.

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Carole E. Hicke

B.A., University of Iowa; economics

M.A., San Francisco State University; U.S. history with emphasis on the American West; thesis: "James Rolph, Mayor of San Francisco."

Interviewer/editor/writer, 1978-present, for business and law firm histories, specializing in oral history techniques. Independently employed.

Interviewer-editor, Regional Oral History Office, University of California, Berkeley, 1985 to present, specializing in California legal, political, and business histories.

Author: Heller, Ehrman, White & McAuliffe: A Century of Service to Clients and Community, 1991.

Editor (1980-1985) newsletters of two professional historical associations: Western Association of Women Historians and Coordinating Committee for Women in the Historical Profession.

Visiting lecturer, San Francisco State University in U.S. history, history of California, history of Hawaii, legal oral history.

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